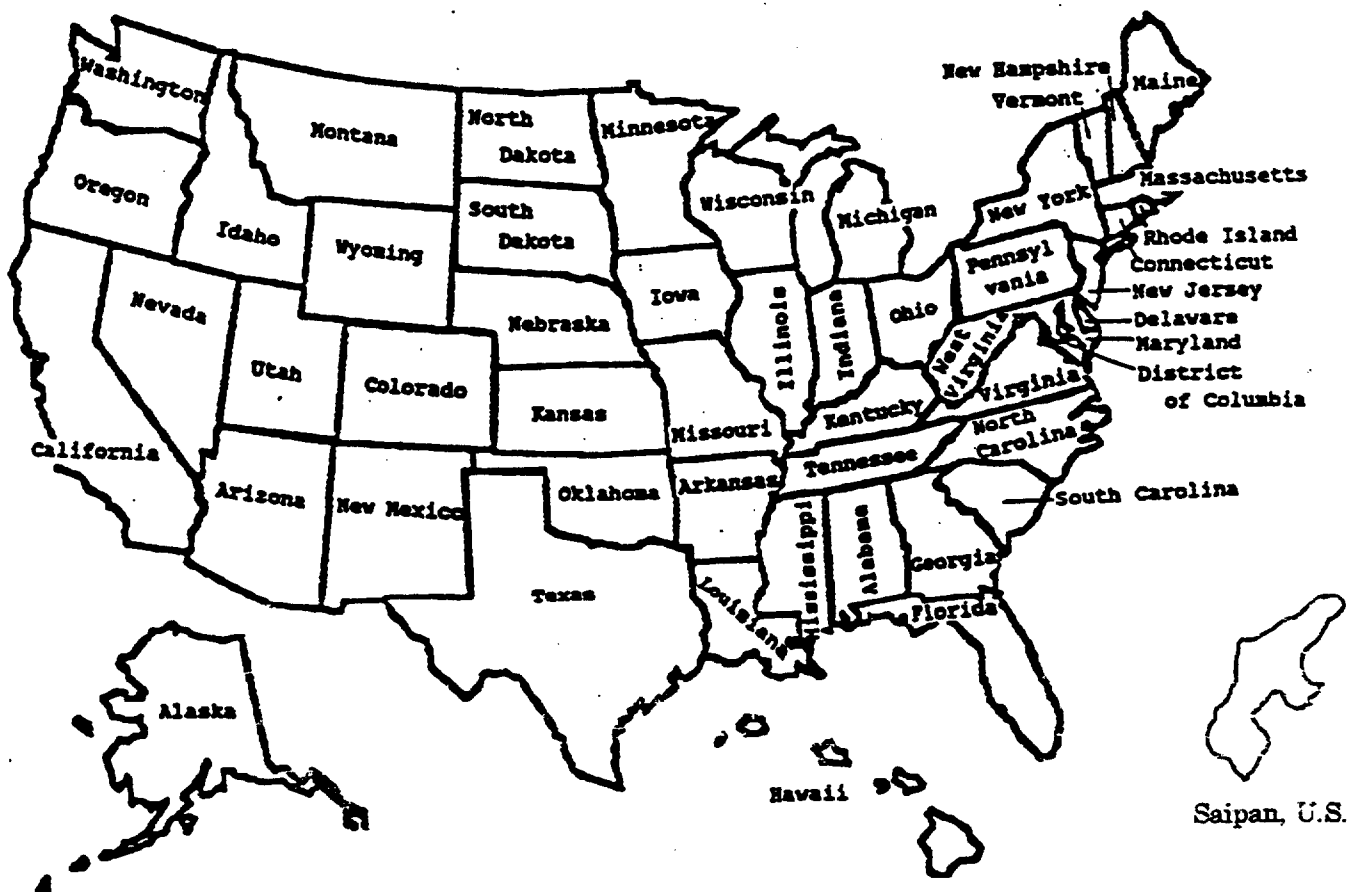


# PARTNERS IN POLICYMAKING NATIONAL ACADEMY

MAY 20-22, 1993  
THE STOFFER HOTEL  
AUSTIN, TEXAS

The colored portions of this map indicate the home states of delegates planning to attend the 1993 National Academy.



## SPONSORED BY:

- Texas Planning Council for Developmental Disabilities
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**Governor's Planning Council  
on Developmental Disabilities**

*Minnesota Department of Administration*

May 20, 1993

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Dear Colleague:

Welcome to the 1993 Partners in Policymaking National Academy. In 1990, 13 states came together at the first National Academy. In 1992, 12 additional states attended the second National Academy. We meet again, for the third Academy, joined by 15 new states and a U.S. territory. We will spend time together discussing strategies for national networking and renewed advocacy and we'll examine the critical federal legislative issues facing us in 1993.

Partners across the United States are visionaries who are taking the actions necessary to turn dreams into realities for persons with disabilities and their families. Partners graduates are teaching others a new way of thinking about people with disabilities. We should all be proud of the Partners' achievements.

The Partners in Policymaking concept we began in Minnesota in 1987 is quite simple: know what's possible and develop skills to carry out your dreams. Participants are expected to become Partners **with** Policymakers over the vast spectrum of disability issues.

To create competent graduates, though, a quality Partners program must be maintained which enables Partners to achieve a variety of critical competencies. State coordinators and funders of every program expect much from their graduates as Partners work towards systems change at the local, state, and national levels. Partners, in turn, should expect much from the program: an intense program that trains them not only in philosophies, but also in concrete strategies to affect change.

This year's National Academy will help every coordinator and every Partner examine a quality Partners model and develop methods to achieve it in every state. I know we all want the powerful impact of Partners to continue. We are committed to continually work to improve the Partners programs, respond to changes, and meet the needs of participants. We can do no less for these valuable individuals who are improving the lives of people with disabilities across our nation.

I hope during this Academy you will meet new friends, renew old friendships, and learn from one another as we have fun in Texas! Please feel free to call on myself or any members of the 1993 National Academy faculty for assistance with your Partners program.

Cordially,



Colleen Wieck, Ph.D.  
Executive Director

**1993 Partners in Policymaking National Academy**  
**The Stouffer Hotel**  
**Austin, Texas**  
**May 20-22, 1993**

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(ND on documents means "No date.")

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**1993 Partners in Policymaking National Academy**  
**The Stouffer Hotel**  
**Austin, Texas**  
**May 20-22, 1993**

***SECTION I - WHAT IS PARTNERS?***  
***Table of Contents***

This is where it all begins. This portion of the notebook provides a basic overview of Partners in Policymaking, why we have Partners, and how to do Partners. "Top 10 Values" and "Why Do We Need It?" detail the principles of the Partners program.

The information presented here also provides specifics on how a Coordinator makes it happen. "A Primer" walks the reader through the step-by-step process of developing the agenda, selecting speakers and hotel sites, recruiting participants, and more. Information in this section is valuable to Coordinators, funders/sponsoring agencies, speakers, and Partners.

The contents of this section include:

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# 1993 Partners in Policymaking National Academy

For Your Notes:

# Partners in Policymaking

## *A QUALITY MODEL*

Partners in Policymaking is an innovative leadership training program for parents of young children with disabilities and for adults with disabilities. Partners is designed to educate and empower its participants to achieve systems change at the local, state, and federal levels. This is a unique training program designed to encourage its participants to alter the future . . . it is designed for the next generation. Partners is not about perpetuating the status quo of today's systems; it's about creating new possibilities for the future.

Partners is the answer to the question, "What would happen if individuals with disabilities and their family members had the training necessary to make them leaders in positive change efforts?" Designed and created in 1987 by Colleen Wieck, Ph.D., Director of the Minnesota Governor's Planning Council on Developmental Disabilities, and Ed Skarnulis, Ph.D., of the Minnesota Department of Human Services, the quality model of Partners in Policymaking responds to the paradigm shifts in the disability field.

In a quality Partners in Policymaking model, the program provides at least 128 hours of sequential instruction over eight weekends, one per month. Through instruction from leaders in the field, Partners learn histories, philosophies, and concrete strategies for creating systemic change in disability areas.

Upon graduation, Partners will be competent in the following areas: history of services and perceptions of people with disabilities; the histories and significant contributions of the self-advocacy, independent living, and parent movements; inclusive education; whole life planning; case management systems and service coordination; supported, competitive employment and supported living; assistive technology and positioning techniques for people with severe physical disabilities; challenging behavior issues; identifying critical disability issues at the local, state, and federal levels, and designing strategies for effective systems change; parliamentary procedure; and community organizing and advocacy organizations.

Benchmarks of a quality model include:

- A full-time coordinator dedicated to the success of the Partners program.
- Sufficient funding to ensure the acquisition of all competencies by Partners.
- A comprehensive and thorough selection process of highly-motivated participants to ensure the best outcomes for systems change and the long-term success of the program.

**A QUALITY MODEL**  
(continued)

- **Involvement of best practices speakers for every session.**
- **Long-term commitment to the program and post-graduate support for Partners to ensure successful on-going efforts in systems change.**
- **Full inclusion of all participants in the program, by using appropriate accommodations and modifications.**
- **A curriculum designed to educate participants in both philosophies and critical strategies for change through readings, small group exercises, and extra assignments.**
- **Constant self-evaluation to monitor the program's level of quality and a willingness to modify the program as needed to attain the highest quality.**
- **Monitoring outcomes of Partners in key areas of personal growth and participating in advocacy activities.**



# Partners in Policymaking

## *WHY DO WE NEED IT?*

Individuals with disabilities and their families have always been the true experts on what they need and what they want in order to have positive, successful lives. Historically, however, systems and governments have dictated what individuals with disabilities receive, which may or may not be what is needed. People with disabilities were faced with, "This is what we have, take it or leave it."

Our society has believed that people with disabilities need to be "taken care of," sheltered, and shown the way. This erroneous belief is based on another erroneous belief, that people with disabilities and their families are not competent to make the best choices for themselves.

As we entered the 1980s, the problems facing people with disabilities and their families were many and complex:

- people with disabilities had been unserved and underserved
- people with disabilities and their families had been controlled by "the system," with little or no choices in services
- people with disabilities and their families lacked self-advocacy and empowerment skills
- people with disabilities had little knowledge of the way local, state, and federal governments operate
- people with disabilities were splintered across disability groups, with no shared vision
- the population of national disability advocacy groups was aging, with little or no "new blood" of parents of young children with disabilities or young adults with disabilities.

Partners in Policymaking provides solutions to these problems as we approach the 21st century. By training participants in "best practices" over a wide spectrum of issues, Partners are achieving the skills necessary to change systems. They become competent to change their own lives, and then to work for changes that will affect others with disabilities at local, state, and federal levels. Partners also creates a shared vision among its participants, enlarging the power base of disability rights advocates.

Partners graduates are expected to be long-term change agents. They learn there are no "quick fixes" and they are trained in how to achieve long-term successes. As the number of Partners graduates increases, a network of highly-motivated, powerful individuals are positively influencing the policymakers of disability issues across the United States . . . they are truly Partners in Policymaking.

# Partners in Policymaking

## "TOP 10" VALUES

A quality Partners in Policymaking program is built on critical values relating to the inherent worth of people with disabilities. These values must be the underlying thread woven throughout every aspect of the training program.

- Value #1: People with disabilities are **people first**. They are not "the handicapped" or "the disabled." Using People First Language is a must - no labels!
- Value #2: People with disabilities need real **friendships**, not just relationships with paid staff.
- Value #3: People with disabilities are entitled to the First Amendment right to free **speech**. The ability to **communicate**, in whatever form, must be available to every person with a disability.
- Value #4: People with disabilities must be able to enjoy full **mobility** and **accessibility** that allows active participation in community life.
- Value #5: People with disabilities must be assured **continuity** in their lives through families and neighborhood connections.
- Value #6: People with disabilities must be treated with **respect** and **dignity**.
- Value #7: People with disabilities need to be in positions to **negotiate** to have their wants and needs met.
- Value #8: People with disabilities must be able to have opportunities to make **choices** in all areas of their lives.
- Value #9: People with disabilities must be able to live in the **homes** of their choices with the supports they want.
- Value #10: People with disabilities must be able to enjoy the benefits of true **productivity** through employment and contributions as members of their communities.

# Partners in Policymaking

## ***COORDINATOR'S ESSENTIAL DUTIES***

1. I will ensure that the recruitment of the Partners class results in a diverse group of qualified individuals: parents of young children with disabilities and adults with disabilities, from all parts of the state, with various disabilities represented. These participants will be ready and willing to learn a new way of thinking and will use this knowledge to achieve systems change at local, state, and federal levels.
2. I will ensure that necessary modifications and adaptations are made to provide equal access to every part of the Partners program for self-advocates with disabilities. Further, I will make all presenters aware of these needs in advance to ensure that every Partner will receive the full benefits of and enjoy full participation in each session.
3. I will design all sessions to ensure that all Partners have the opportunity to learn that session's competencies. The critical factors include: the selection of the speaker and his/her topic, hand-outs, activities, small group exercises, and homework.
4. I will ensure that every session has a combination of learning methods: presentation, discussion, and exercises.
5. I will structure the year's program so that Partners learn competencies in a logical, sequential order, with each session adding to the completeness of the program.
6. I will ensure that Partners sessions reflect the values being taught: inclusion, empowerment, and respect for all individuals in the program.
7. I will actively encourage and facilitate, when necessary, friendships and relationships between parents and self-advocates in the Partners class, in order to develop the camaraderie necessary for a successful long-term Partners network.
8. I will ensure open communications between Partners staff, participants, speakers, and guests.
9. I will ensure that every participant has an accurate agenda for each session at least two weeks in advance. Each agenda will be specific as to starting and stopping times of each topic during the weekend, break and meal times, meeting room locations, types of activities during each session, e.g. lecture, small group activities, etc.

## **COORDINATOR'S ESSENTIAL DUTIES**

**(continued)**

- 10. I will ensure that meetings are run on schedule, respecting the valuable time of each participant and each speaker. In addition, all Partners and speakers will have a clear understanding of expectations.**
- 11. I will prepare packets of information for each participant, for every session, which will include the agenda, hand-outs from the speakers, biography of the speakers and their addresses, other reading materials, homework assignments, evaluations, and reimbursement forms.**
- 12. I will encourage all Partners to write thank you letters to speakers and/or guests, both as an exercise in letter writing and also as a means of Partners expressing appreciation to the speakers/guests for impacting the Partners' lives.**
- 13. I will personally visit the hotel site prior to booking to verify accessibility in hotel guest rooms and bathrooms, elevators, meeting rooms, public restrooms, restaurants, bars, and entrances.**
- 14. I will familiarize myself with the meeting rooms of the hotel, e.g. the thermostat, lights, microphones, etc., and I will work closely with the hotel staff to have contingency plans in place in case of any problems and/or mechanical failures.**
- 15. I will work with the hotel staff to assure that all persons involved in Partners are treated with dignity and respect.**
- 16. If videotaping or audiotaping the training sessions, I will solicit and receive prior permission from the speaker to record his/her presentation. These recordings will be used by Partners who may be absent.**
- 17. If videotaping or audiotaping the training sessions, I will ensure that the appropriate personnel are in place with the appropriate equipment in order to successfully and unobtrusively record the sessions.**
- 18. I will prepare a supply box for use during the session which will include: flip charts, markers, 3 hole punch, masking tape, extra name tags, sharpened pencils, writing tablets, hand-outs of previous sessions, extra tapes when recording sessions, and any other materials necessary to ensure a smooth, worry-free session.**
- 19. I will be an active observer of every Partners session, remaining in the meeting room during the session, to assess the speakers' presentations, to gauge Partners' participation, and to self-evaluate the success of that session.**
- 20. I will recruit nationally-recognized speakers who are leaders in their field who will instruct Partners in "best practices" in disability issues.**

**COORDINATOR'S ESSENTIAL DUTIES**  
(continued)

21. I will ensure that each speaker understands exactly when and where his/her presentation time(s) are via written personal communication and by mailing him/her the session agenda well in advance of the scheduled presentation.
22. I will arrange for and/or provide the speakers' hotel accommodations and transportation from the airport to the hotel. I will provide the speakers with the name, address, and telephone number of the hotel, along with directions from the airport to the hotel.
23. I will clarify with the speakers via their contract who is financially responsible for what expenses, e.g. transportation, meals, incidentals, etc.
24. I will clarify with the speakers, via written requests/forms, their audio/visual needs: slide projector, screen, overhead projector, videotape player and TV monitor, etc., their hotel accommodations, and any other needs they might have in order to ensure a successful presentation.
25. I will inform every speaker of the date I need their hand-outs prior to his/her presentation, in order to be able to copy them and include them in the monthly packets for participants.
26. I will ensure that speakers present not only philosophies of disability issues, but also concrete information and specific strategies to create systems change.
27. I will ensure that each speaker has a clear understanding of what is expected from his/her presentation, and what competencies should be achieved by participants during the session. I will also inform the speaker of the unique and individual dynamics of the members of the Partners class, so that the speaker is presenting information geared to the level of understanding of the class, e.g. basic philosophy, basic or advanced strategies, etc.
28. I will seek funding for Partners from sources who: support the vision of a Partners in Policymaking quality model, believe in the value of empowerment, and will nurture the efforts of the Partners staff and its participants.
29. I will assess all aspects of my state's Partners program regularly, via self-evaluation, Partners' evaluations, and outside evaluation, and will make whatever changes are necessary to ensure that the program reflects the highest quality standards.
30. I will provide post-graduate support for Partners to ensure that graduates can and will continue the systems change advocacy learned during their training.

# 1993 Partners in Policymaking National Academy

For Your Notes:

# Partners in Policymaking

## *A PRIMER*

The Coordinator of a Partners in Policymaking training program can be compared to a skillful artist who uses the tools of the trade to magically turn a blank canvas into a masterpiece. In Partners, diverse aspects of the program are skillfully combined to create a one-of-a-kind training program. The major tools that a Coordinator uses include: setting the agenda for the year's training sessions, securing the hotel site(s), selecting the speakers, and recruiting the participants. Many of these tasks must be done simultaneously, so efficient organization of the Coordinator's time, energies, and staff are critical.

### **SETTING THE AGENDA - 1 Year Ahead**

The first step is to determine the agendas for the year's training sessions based on the competencies to be achieved. Experienced Coordinators begin work in this area one year in advance. The topics of the training program and the sequence of topics must be decided. Please refer to the Partners "Curriculum, Part I and Part II." The year's agenda is based on the Partners in Policymaking competencies and the suggested curriculum topic areas including:

- history of people with disabilities and the histories and contributions of the self-advocacy, parent, and independent living movements
- inclusive education
- whole life planning, personal futures planning, and service coordination
- supported living and employment and family support
- local, state, and federal policies and services, legislative issues, and strategies to implement change
- assistive technology and challenging behavior issues
- parliamentary procedure and affecting policy of boards and commissions
- community organizing and advocacy organizations.

This listing is representative of the topics that could be included in a year's agenda, with sessions and levels of competencies building on each other. Please refer to "Section III - The Sessions" of this manual for more details. It is preferable to arrange the sequence to ensure that your state legislature is in session during the weekend on state legislative issues.

As the agendas are being formulated in this early stage, potential speakers need to be identified. Develop a list of three or four qualified national speakers for each topic. This will provide flexibility when you make your initial contacts with them after the dates and hotel sites have been decided.

**A PRIMER**  
(continued)

**PICK YOUR DATES - 1 Year Ahead**

The next step is selecting the dates for the eight monthly sessions. The recommended times for a successful program are approximately 12 Noon to 9:00 PM on Friday and from 8:00 AM through 3:00 or 4:00 PM on Saturday. As much as possible, it is important not to have big gaps of time between the monthly sessions, with the exception of the holiday season. Experienced Coordinators have found it best not to have a session too close to major holidays. In addition, attendance during the summer months may be jeopardized because of family vacations, etc. In some areas, winter weather may cause cancellations.

In selecting the dates for each of the eight monthly sessions, the Coordinator needs to look at what else is happening in the area. If a major sports event or some other large activity is scheduled on the same weekend as Partners, the Coordinator may not have much luck in finding a hotel with space available. At the same time, the Coordinator needs to avoid conflicts with national disability conferences, because the needed speakers may not be available if they're attending a conference elsewhere. Alternate dates need to be considered in the event of conflict with a speaker's schedule or hotel availability.

**SELECT HOTEL SITE(S) - 1 Year Ahead**

At the same time the dates are being selected, potential hotel sites need to be investigated. This investigation should focus on hotel accessibility for participants and/or speakers with disabilities. A site visit to each potential hotel is mandatory at which the following questions should be addressed:

- How many accessible guest rooms are available?
- Are the bedroom areas truly accessible?
- Are the baths in the guest rooms truly accessible?  
(If in doubt about true accessibility, have a person with a physical disability inspect the hotel with you.)
- Is the main entrance to the hotel accessible?
- Are the common areas of the hotel accessible, e.g. public restrooms, restaurants, bars, lobby areas, etc.? (Go into every public restroom - for men and women - to see for yourself!)

Many hotel operators believe they do provide accessibility and they will proudly tell you over the phone they are, indeed, accessible. However, a personal inspection is a must because many hotels are not truly accessible.

When one or more hotel sites have been deemed acceptable, it's time to begin finalizing the hotel selection and negotiating the contract for guest rooms, meeting rooms, catering of meals, audio-visual equipment, etc. Since the Partners participants have not yet been selected, the special needs are not yet known, so try to block at



least ten accessible rooms (or all the accessible rooms the hotel has, if they have under ten). It's best, however, to not sign the hotel contracts until the speakers have been confirmed.

For ease and comfort of all concerned, using the same hotel every time can be best. It also makes it easier on the Coordinator, as a relationship is developed between the Coordinator and the hotel staff. However, depending on the location of the hotel, another site might be more appropriate during the state legislative weekend. The ideal training session includes a visit to the State Capitol and a mock hearing in the Capitol. Because of transportation needs, including paratransit and time constraints, a hotel close to the Capitol is worth investigating.

### **SELECT SPEAKERS - 1 Year Ahead**

At the same time the hotel sites are being confirmed to fit the selected dates, it's time to begin contacting the speakers. Obviously, the speakers for the first two or three sessions need to be confirmed first, followed by the remainder of the year's speakers. The initial contact should be made by telephone, at which time the speaker's availability, the topic, and the honorarium/fee are discussed.

Upon securing the speaker's commitment, a confirmation letter, detailing the hotel's location, the presentation topic, travel arrangements, and other pertinent information; a contract; and an A/V request need to be sent to the speaker. Later, approximately two to four weeks prior to the presentation, the session agenda needs to be sent to the speaker, which provides the exact time of the presentation and details the speaker's presentation in relation to the entire training session.

At this time in a first year Partners training program, the participants have not yet been recruited. However, as the year progresses, the Coordinator will begin to get a feel for the dynamics of the group, the different levels of education, the learning styles represented, and the individuals involved. As this information becomes known, it is critical for the Coordinator to share this with speakers prior to their presentations. This will allow the speakers to tailor their presentations to "fit" this particular group of Partners, which, in turn, provides the best learning experience for the participants.

### **FINALIZE IT ALL - AGENDAS, SPEAKERS, HOTEL(S)**

After the speakers have been selected, the hotel accommodations and agendas can be finalized. In some cases, if the desired speaker is unavailable for the selected date, an alternate date will be selected, which may affect the hotel accommodations. If there is no option of an alternate date, then an alternate speaker must be chosen to fit the date. This is wrap-up time, when everything is falling into place because of the magic touch of the Coordinator! Now the fun begins!

## **PARTNERS RECRUITMENT AND SELECTION - 6 Months Ahead**

No later than six months prior to the very first Partners training session, announcements of the program and applications need to be mailed out. The applications need to be returned to the Coordinator within two months, or approximately four months prior to the first session.

After all the applications are received, six weeks should be allocated for the selection process by the selection committee. After the participants have been identified, they should be notified of their selection approximately six weeks prior to the first session.

The selection committee functions most efficiently if it is a group of about five people. These individuals should be knowledgeable about current disability issues and future trends. They should also have an understanding of the values of self-advocacy and the goals of Partners in Policymaking. The committee could be composed of the Partners Coordinator, a Developmental Disabilities Council member and/or staff member, a parent of a child with a disability or an adult with a disability, and/or persons associated with disability advocacy organizations.

Each selection committee member should receive a complete set of copies of all the Partners applications, as well as scoring/assessment forms. Individually, each member of the selection committee rates each applicant. Committee members need to examine not only the personal attributes of each candidate, but must also consider gender ratios, geographic representation, ethnic diversity, and types of disabilities.

The group then meets together to jointly select the candidates. During this part of the process, the selection committee will probably have deleted some individuals who do not fit the criteria, decided on some who are perfect for the program, and identified many who are possibilities. All this is discussed in depth at the selection meetings. Using grids to cover all the criteria can be very helpful.

A class of 30-35 Partners is recommended, consisting of up to one-third adults with disabilities, with the remainder being parents of young children with disabilities. This size class is preferred for several reasons: it is manageable for the Coordinator; it allows for good dialogue between participants and speakers during the sessions and, therefore, more effective learning; it is affordable for the funders of the Partners program; and it promotes easier friendships and bonding among the participants.

Because there is usually a smaller pool of adults with disabilities than parents of young children with disabilities, it is best to select consumers/self-advocates first. The remainder of the class will be parents of young children with disabilities. An "alternate" list needs to be developed in the event any of the selected participants elect not to become Partners prior to the first session.

Recruitment of "new blood" is critical to the success of the Partners training program! The selection committee needs to focus on those individuals who are not already entrenched in disability systems and or advocacy movements. The program's success

is dependent on finding people who are not stuck in the status quo, but who are ready to learn new ways of thinking!

How do you find potential Partners in Policymaking? Utilize the mailing lists, resources, and contacts of Developmental Disabilities Planning Councils, University Affiliated Programs, Protection and Advocacy organizations, state and local disability advocacy groups, parent training information centers, waiver program providers, service providers, rehabilitation offices, independent living centers, health care providers, early childhood intervention programs, and special education programs.

While most organizations will not provide you with their mailing lists, many WILL print your announcement and a contact name in their newsletters. So send your announcement/application to the organizations listed above and ask that the information be included in their next publication. Some organizations may ask for a large number of announcement/applications to send out WITH their newsletters.

Send press releases to every newspaper in the state. Small newspapers will almost always run the announcement, reaching applicants in rural areas of the state that may otherwise be unaware of Partners in Policymaking.

### **YOU'RE IN THE HOME STRETCH - 6 Weeks Ahead**

The class of Partners has been selected and now they must be notified. Approximately six weeks prior to the first session, a packet containing: congratulatory letter, contract for training, profile information, and readings/homework needs to be sent to every new Partner. The profile contains information regarding the special accommodations needed by Partners while attending the training sessions. This information will be needed by the Coordinator and the hotel staff. The profile and contract need to be returned to the Coordinator within two weeks.

Letters must also be sent to those applicants chosen as alternates and to those who are not accepted. If efficient timelines are followed and a selected participant is unable to commit to the training prior to the first session, the Coordinator will still have time to select an alternate.

After the contracts and the profiles have been received by the Coordinator, a letter detailing travel arrangements, hotel location and map(s), and a schedule of the year's sessions need to be mailed to all participants. Individual telephone contacts may need to be made for those with specific needs.

If possible, allow adults with disabilities needing assistance to bring their own personal care assistants. However, if they do not already have an assistant and need help finding one, University Affiliated Programs or other college programs are good sources to find a young person interested in assisting a person with a disability.

## **A PRIMER (continued)**

It's preferable for hotel accommodations and meals during training to be direct billed to the Partners program. Experienced Coordinators have found that handling airline reservations and mailing the tickets to Partners allows the Coordinator to find fares at the lowest possible rate. This also reduces the cash outlay for Partners participants.

Investigate and arrange for transportation for those Partners with physical disabilities who cannot do so on their own. Check on the paratransit rules and appointment times, etc.

### **FINALIZE CATERING AND HOTEL ACCOMMODATIONS - 3 Weeks Ahead**

Most hotels need to finalize the details of the meeting about three weeks ahead of time, including: the rooming list, audio-visual needs, meeting room set-up, and meal choices. Regarding the set-up of the meeting room, the Coordinator needs to provide information on: having a registration table just outside the meeting room; the number of round tables; table placement to ensure accessibility; type of speaker table and/or podium; placement of audio/visual equipment; water pitchers, glasses, and STRAWS on all tables, including the speaker table; a water pitcher, glasses, and straws at the back of the room and extra chairs at the back of the room for staff, speakers, and guests.

Buffets for all meals provide choices for participants. Buffets may be difficult for some individuals with disabilities, but the benefits often outweigh the problem . . . for buffets provide a wonderful opportunity for Partners to get to know each other and bond by helping one another. If a buffet is chosen, make sure the tables and the serving dishes are kept low enough for a person in a wheelchair to see the food and to serve him/herself, if possible. Again, straws need to be available at all times. At a set meal, choose a menu that does not include soup or foods that are hard to scoop.

The hotel will usually want a final meal count approximately 72 hours in advance. The count is always a minimum, that is, you cannot lower the count during the session if the numbers of diners decrease. However, you can increase the count some. Keep in mind that most hotels prepare 5% overage anyway, so if you're expecting 40 diners, you could turn in a count of 38 and know there will be enough.

### **PREPARE PACKETS - 1 to 2 Weeks Ahead**

A packet of materials needs to be prepared for each Partner for every session. The Coordinator should include in each packet: a name tag; the agenda for this session, with times, speakers, and meeting room assignments; hand-outs from the speakers; reading materials/homework; time/match form; session evaluation form; and a general agenda for the next session.

At this same time, send a copy of the detailed agenda to all of the speakers for that session. When preparing the agenda for this first session, allocate time on Friday for

each Partner to introduce him/herself. At subsequent meetings, allocate time (15-30 minutes total) for Partners to share news of themselves and their families with the other Partners. Also, prepare a box of supplies of everything that might be needed to ensure a successful training session.

### **"P"- DAY - THE FIRST SESSION IS FINALLY HERE!**

On the big day (and every session thereafter), a registration table should be set up just outside the meeting room, with sign-in sheets for Partners and facilitators/attendants, packets for every Partner, pens or sharpened pencils, and writing tablets for those who need them. This registration table should be occupied by the Partners Coordinator and/or a staff member. Place a label on the outside of each packet with each Partner's name, which will allow the participants to pick up their own packets.

The Coordinator and a staff member should be in attendance in the meeting room during all sessions at all times. The staff member can assist with problems with the hotel, while the Coordinator can remain in the meeting room to assist with speakers' needs, to gauge the speakers' presentations, and to assess Partners' participation, understanding, and interest in the speakers/topics.

During the first session, ask all Partners to write a one page biography of themselves and bring to the second session. The Coordinator should copy these and each Partner should be given an entire set of the bios at the third session.

Congratulations! The magic worked and the first session was a huge success!

### **AFTER THE FIRST SESSION - GETTING READY FOR THE SECOND!**

At this time, mail out the initial survey to all Partners. This survey will become a part of the independent evaluation of the Partners program, along with a 6-month follow-up survey, and a long-term survey. These documents will yield an honest examination of the program and its benefits and successes. With the initial survey, enclose a stamped envelope addressed to the independent evaluator. Sending the initial survey to Partners AFTER the first session helps ensure more accurate answers to the survey questions since participants have a better understanding of Partners in Policymaking then.

Now it's time to read the session evaluations, review what worked and what didn't, and make necessary changes. One week after the first session, it will be time to begin working on the next session!

### **FAST FORWARD AHEAD TO OTHER SESSIONS AND GRADUATION**

Midway through the Partners' year, begin planning the Post-Graduate Training, which

## **A PRIMER (continued)**

will take place six months after graduation. All the year's graduates will reconvene for one weekend of advanced training by specific speakers.

A special touch many Partners participants have appreciated is a class photo. Two sessions prior to the graduation session, have a photographer take a group photo of the Partners class. Doing it this far ahead ensures that if the photo doesn't work out, there is still another session to try it before graduation. A copy of the photo can be presented to each Partner at graduation. They will need time to autograph each others' photos.

During the last session prior to graduation, Partners should turn in a commitment for their selected project, which must be completed within six months of graduation. At this time, they should also start thinking about the two minute presentation they will each give at graduation on what Partners means to them.

A month prior to graduation, order the diplomas and arrange for the calligraphy of the Partners' names. Successful graduation ceremonies have included a reception for the graduates, with invited policymakers in attendance. Prepare invitations to the reception. Each Partner is given one invitation to mail or give to the policymaker of his/her choice. The Coordinator invites state and federal legislators, the governor, and other interested policymakers and guests.

Ask the governor to issue a proclamation or have a resolution passed by the state legislature to celebrate the Partners' graduation. Send press releases out and invite the media. Enjoy the fruits of your labors!

## **SIX MONTHS AFTER GRADUATION**

Mail out the six-month follow-up survey to the graduates and enclose with it a stamped envelope addressed to the independent evaluator. Celebrate Partners successes at the Post-Graduate Training, when you bring the graduates back together for a weekend of advanced training. During this session, each Partner should report on his/her project and submit a one page summary of same.

## **EIGHTEEN MONTHS AFTER GRADUATION**

Mail out the long-term follow-up survey to graduates (and in future years, to ALL graduates) and enclose with it a stamped envelope addressed to the independent evaluator.

**HAVE FUN! YOU'VE ALREADY FINISHED YOUR SECOND YEAR AND YOU'RE BEGINNING YOUR THIRD PARTNERS CLASS!**

# Partners in Policymaking

## **MAJOR TASKS AND TIMELINES**

### **AT A GLANCE**

**1 Year Ahead**

**6 Months Ahead**

**6 Weeks Ahead**

**3 Weeks Ahead**

**1-2 Weeks Ahead**

Determine Agenda  
 Pick Dates  
 Select Hotel Sites  
 Select Speakers  
 COORDINATE IT ALL!

Mail out applications  
 and begin recruitment  
 process.

Notify Applicants

Finalize Catering/  
 Hotel Accommodations

Prepare Packets/  
 Handouts, etc.

**SAMPLE**  
 Modify as Necessary  
 These are MAJOR tasks. Add your own details.

# 1993 Partners in Policymaking National Academy

For Your Notes:



**1993 Partners in Policymaking National Academy**  
**The Stouffer Hotel**  
**Austin, Texas**  
**May 20-22, 1993**

**SECTION II - RECRUITMENT/SELECTION**  
**Table of Contents**

This portion of the notebook details the basics of recruiting applicants for Partners in Policymaking. The process begins with application forms being flooded across the state and ends with the selection committee poring over the applications as they search for the very best group of Partners. Forms in this section of the notebook will assist the Coordinator in the initial recruitment efforts, as well as in communicating with applicants on their way to becoming Partners.

The majority of these materials are self-explanatory. The "Initial Survey" is a tool that will be used by an independent evaluator and this form is given to Partners AFTER their participation in the first session. More details about recruitment can be found in "A Primer," beginning on page 11, in Section I of this manual.

The contents of this section include:

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Application for Participation	Page 25
Selection Criteria	Page 29
Steps in Selecting Partners	Page 30
Chart of Demographic Data	Page 31
Reviewer Rating Sheet Instructions	Page 32
Consumer Rating Form	Page 33
Parent/Family Member Rating Form	Page 34
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Partners Profile	Page 41
Partners Instruction Letter Prior to First Session	Page 42
Initial Survey	Page 43

# 1993 Partners in Policymaking National Academy

For Your Notes:

# **Partners in Policymaking**

## ***Invitation Letter***

*(On Your Letterhead)*

(Date)

## **DD Council Seeks Participants for Partners in Policymaking Program**

Partners in Policymaking is a leadership training program for self-advocates and parents. It provides state-of-the-art knowledge about developmental disabilities issues and builds the competencies necessary to become advocates who can effectively influence public officials.

The (State) Planning Council for Developmental Disabilities is currently seeking applications from interested people who have developmental disabilities or who are parents of young children with developmental disabilities to participate in Partners in Policymaking. This program is designed to provide information, training, and skill building so that participants may obtain the most appropriate state-of-the-art services for themselves and others.

"Partners" learn about current issues and best practices and become familiar with the policymaking and legislative processes at the local, state, and federal levels. The overall goal is to achieve a productive partnership between people needing and using services and those in a position to make policy and law.

Partners attend 2-day training sessions eight times a year with each session beginning Friday at noon and concluding late Saturday afternoon. Each session is devoted to specific topics with nationally known experts as presenters. Partners are expected to complete assignments between sessions and to commit to one major assignment, such as serving an internship, organizing a letter writing campaign, or organizing special receptions or town meetings for public officials.

In general, session topics may include:

- History - Independent Living Movement, Parent Movement, Self-Advocate Movement
- Inclusive Education
- Supported Living, Supported Employment, Personal Futures Planning, Family Support
- Assistive Technology, Seating and Positioning, Challenging Behavior
- Federal Policy and Legislative Issues
- State Policy, Services, and Legislative Issues
- Parliamentary Procedure and How to Run Meetings
- Community Organizing, Advocacy Organizations, and Successful Efforts

INVITATION LETTER  
(continued)

The Council is actively seeking highly motivated men and women to participate in the Partners in Policymaking program. We are particularly eager that members of the group represent different ethnic backgrounds, different geographic regions of the state, and a variety of disabilities. Also, we are especially interested in reaching persons who are not actively involved in existing advocacy organizations. Please feel free to make copies of this packet for dissemination to interested individuals or call the DD Council to obtain additional copies. Expenses for travel, lodging, meals, respite care, and assistant services for program participants will be reimbursed.

Applications **must** be postmarked by (date) to be eligible. Fax copies will not be accepted. Final selection will be made by (date). Dates for the (year(s)) monthly training sessions are (list dates). **Attendance at all sessions is mandatory.**

Applications are available in braille, large print, (ASCII), and on audio cassette. To obtain alternate formats, please contact:

(Name of Coordinator  
Address of Coordinator  
Telephone Number of Coordinator  
with 800 and TDD numbers)

**SAMPLE**  
**Modify as Necessary**  
**This document is used in conjunction**  
**with the Application for Participation form.**

# Partners in Policymaking Application for Participation

Application Deadline:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone: ( \_\_\_\_\_ ) \_\_\_\_\_ Daytime Number: ( \_\_\_\_\_ ) \_\_\_\_\_

Are you: \_\_\_\_\_ Male \_\_\_\_\_ Female Race: \_\_\_\_\_

1. Are you a person with a developmental disability? (See definition on back page.)

\_\_\_\_\_ YES \_\_\_\_\_ NO Your age: \_\_\_\_\_

If yes, please describe the disability (or disabilities): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

2. Are you a parent of a son or daughter with a developmental disability? (If you have more than one child with a disability, please answer for each child. See definition of "developmental disabilities" on back page.)

\_\_\_\_\_ YES \_\_\_\_\_ NO Please give us your age: \_\_\_\_\_

If yes:

a. Describe how the disability affects the ability of your son/daughter to function in at least three (3) of the areas of major life activity (Part "D" of the definition):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

b. How old is your son/daughter? \_\_\_\_\_

c. What is the disability (or disabilities)? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

2. Continued:

d. Describe the school placement: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

e. Does your son/daughter live at home? \_\_\_\_\_ YES \_\_\_\_\_ NO

f. Do you have other children?

\_\_\_\_\_ YES \_\_\_\_\_ NO

If yes, what are their ages? \_\_\_\_\_

3. What services (employment, attendant, respite care, case management, etc.) are you or your child currently receiving? \_\_\_\_\_  
\_\_\_\_\_

4. Why are you interested in participating in the Partners in Policymaking program?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Is there a specific issue, area of concern, or problem that encourages you to apply for this program?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Will you make a commitment to attend eight 2-day sessions, held monthly from August to April?

\_\_\_\_\_ YES \_\_\_\_\_ NO

7. Will you travel to Austin to attend the regularly scheduled meetings?

\_\_\_\_\_ YES \_\_\_\_\_ NO

8. Are you willing to do homework assignments (primarily reading)? \_\_\_\_\_ YES \_\_\_\_\_ NO

9. Are there any special accommodations necessary for you to participate in this program?

\_\_\_\_\_ YES \_\_\_\_\_ NO

If yes, describe accommodations needed (accessibility, interpreters, respite care, attendant services etc.):

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10. Please list any memberships in advocacy organizations and indicate any office held.  
(Membership in other organizations is not a requirement):

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11. What types of experience have you had in advocating for people with developmental disabilities?

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12. Please tell us a little about yourself and your family:

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13. Please list two references—names, addresses and phone numbers:

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14. Please indicate how you learned about Partners in Policymaking:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Please mail the completed form to:*

(Name, Address, Telephone Number(s) of Coordinator)

**SAMPLE**

Modify as Necessary

This document is used in conjunction  
with the Invitation Letter.

1993 Partners in Policymaking National Academy

## Developmental Disabilities Definition

The term "developmental disabilities" means a severe, chronic disability of a person 5 years of age or older which --

(A) is attributable to a mental or physical impairment or a combination of mental and physical impairments;

(B) is manifested before the person attains age twenty-two;

(C) is likely to continue indefinitely;

(D) results in substantial functional limitations in three or more of the following areas of major life activity:

- self care,
- receptive and expressive language,
- learning,
- mobility,
- self-direction,
- capacity for independent living, and
- economic self-sufficiency; and

(E) reflects the person's need for a combination and sequence of special, interdisciplinary, or generic care, treatment, or other services which are of lifelong or extended duration and are individually planned and coordinated; except that such term when applied to infants and young children means individuals from birth to age 5, inclusive, who have substantial developmental disability or specific congenital or acquired conditions with a high probability of resulting in developmental disabilities if services are not provided.

Source: Developmental Disabilities Assistance and Bill of Rights Act of 1990 (P.L. 101-496.)



# **Partners in Policymaking**

## ***Selection Criteria***

**Minority Representation**

**Rural/Urban Mix**

**Good Geographical Representation**

**Not Involved in Advocacy Organizations/New Blood**

**Gender: Male/Female Mix**

**Cross Disability Representation**

**Motivated for Systems Change vs. Personal Gain**

**Pro-Community**

**Enthusiasm for Learning**

**Evidence of Commitment to Long-Term Advocacy Efforts**

**Age:**

**Parents of Children 5 and Under Most Preferable**

**Self-Advocates Under 35 Most Preferable**

# Partners in Policymaking

## *Steps in Selecting Partners*

1. After the deadline for receiving applications, the Coordinator should go through the applications and complete the Chart of Demographic Data. Save this chart for later use.
2. If there are any applications that are clearly outside the criteria (e.g., a person who is not a family member nor a person with a disability), remove those applications and send a letter of non-acceptance.
3. Copies of the remaining applications should be made and an entire packet of those applications should be sent to the review/selection committee members for rating and ranking. Each reviewer should also receive the Reviewer Rating Sheet Instructions, Consumer Rating Forms, and Parent Rating Forms. (Some states involve Partners graduates as reviewers, while other states use Council members/staff. In addition, some states use one set of reviewers to do the initial screening, while another committee makes the final decisions.)
4. The Coordinator should compile all scores, ratings, and rankings from the reviewers and derive a composite score which is added to the Chart.
5. At a meeting of the final review committee, each application should be reviewed, including the scores from the first review committee. The applications will sort out into three groups: 1) very strong candidates, 2) possible candidates, and 3) unlikely candidates.
6. At this point, a count should be made regarding each demographic area. Final decisions need to balance all factors. Applicants can be drawn into the final pool to achieve a balanced group (males, minority, rural/remote areas, age of child, etc.).

**SAMPLE**  
**Modify as Necessary**

# Partners in Policymaking Chart of Demographic Data

Name of Applicant	Gender M F	Geographic Area of State	Person with a Disability	Parent	Type/Severity of Disability	Rank

**SAMPLE**  
Modify as Necessary

# Partners in Policymaking

## *Reviewer Rating Sheet Instructions*

(NOTE: This is one way for reviewers to go through applications and assign rank orders.)

Please review each application and score from 1 to 5 with 5 being the strongest candidate and 1 being the least likely candidate. Within each score (1 to 5) rank order the applications: 5.1 is the highest to 5.x as the lowest.

1. **Target Group:** Our goal is to select parents of young children and adults with disabilities. We are trying to include adults with disabilities in natural proportion to overall size of the group.
2. **Severity of Disability:** Our goal is to serve people with severe disabilities from the full range of developmental disabilities.
3. **Next Generation:** Our goal is to prepare the next generation of leadership. We encourage individuals who do not have demonstrated leadership skills to apply.
4. **Commitment to Values:** As you read the applications, please look for commitment to values of integration/inclusion, independence/interdependence, and productivity/contribution. If there is an indication that the applicant is committed to the opposite values, try to discern whether the applicant is trying to move toward the program's values. Does the applicant seem willing to learn about best practices?
5. **Commitment to Program:** In reading the application, look for commitment to attendance, desire to learn, willingness to share information, interest in advocacy, and systems change.

Please return your scoring to: (name and address) by (date). If you have any questions, call (name) at (phone number).

Thanks for your help in this most important task.

**SAMPLE**  
**Modify as Necessary**

# Partners in Policymaking *Consumer Rating Form*

(**Note:** This is a second approach for rating each application. The Coordinator would need to add a scoring system to this form and to the following Parent/Family Member Rating Form.)

Name \_\_\_\_\_

## **BEST PRACTICES**

- 1. Recognition of importance of Independence, Productivity, and Inclusion/Integration. \_\_\_\_\_
- 2. Understanding or willingness to learn that most services do not reflect best practices. \_\_\_\_\_

## **ADVOCACY**

- 3. Commitment to long-term advocacy efforts. \_\_\_\_\_
- 4. Support for system change strategies versus personal gain. \_\_\_\_\_

## **OTHER**

- 5. Unique circumstances or personal history. \_\_\_\_\_

## **PERSONAL CHARACTERISTICS**

- 6. Minority applicant. \_\_\_\_\_
- 7. Minimal prior advocacy experience. \_\_\_\_\_

## **TOTAL**

\_\_\_\_\_

**SAMPLE**  
Modify as Necessary

# Partners in Policymaking *Parent/Family Member Rating Form*

(Note: This is a second approach for rating each application. The Coordinator would need to add a scoring system to this form and to the previous Consumer Rating Form.)

Name \_\_\_\_\_

## **BEST PRACTICES**

1. Recognition of importance of Independence, Productivity, and Integration. \_\_\_\_\_
2. Understanding or willingness to learn that most services do not reflect best practices. \_\_\_\_\_

## **ADVOCACY**

3. Commitment to long-term advocacy efforts. \_\_\_\_\_
4. Support for system change strategies versus personal gain. \_\_\_\_\_

## **OTHER**

5. Unique circumstances or personal history. \_\_\_\_\_

## **PERSONAL CHARACTERISTICS**

6. Minority applicant. \_\_\_\_\_
7. Minimal prior advocacy experience. \_\_\_\_\_
8. Father of child with a disability. \_\_\_\_\_
9. Son/daughter age Birth - 5 years. \_\_\_\_\_  
Son/daughter age 6 - 10 years. \_\_\_\_\_

## **TOTAL**

\_\_\_\_\_

**SAMPLE**  
Modify as Necessary

# Partners in Policymaking

## *Letter of Acceptance*

(On Your Letterhead)

Date

### SAMPLE

### Modify as Necessary

Name  
Address  
City

Dear (Applicant):

**Congratulations! You have been selected to be a participant in our (year: first, second) class of Partners in Policymaking. We received (number) applications from all over the state. The task of selecting only (number) for this class was extremely difficult.**

**We appreciate your willingness to make such a significant commitment. As you know, Partners in Policymaking is a leadership training program designed to increase empowerment and improve self-advocacy skills. For the training to be most effective for you and others, we must emphasize that consistent attendance is critical. We therefore require that everyone be present at all sessions (unless you have a medical emergency). We have enclosed a schedule showing the dates of the eight training sessions. Please look it over and contact us immediately if you feel you cannot commit to this schedule. All of the sessions are in (city), unless otherwise noted.**

**Your contract is enclosed. Please read it carefully. It outlines the reimbursement of expenses and requires several commitments from you. If you agree to all items, please sign and return it to us by (date). We will review reimbursement procedures and ground rules in more detail with you during the first session.**

**Our first session will be held Friday and Saturday, (dates), at (name and address of hotel). Registration will begin at (time) on Friday, and we will adjourn by (time) on Saturday. We will reserve a room for you if you live outside the (city) area and arrange to have the room direct billed to our office. We will also provide Friday dinner and Saturday breakfast and lunch. Please complete the enclosed Partner Profile so we can make appropriate arrangements and rooming assignments for you. If you ever have any questions about hotel arrangements, contact our office. Please do not contact the hotel directly.**

**LETTER OF ACCEPTANCE  
(continued)**

**Date  
Name  
Page 2**

**We also ask that you please be prompt for all meetings. Because of limited space, we will not be able to accommodate any visitors at the Partners training sessions. Please keep that in mind if you bring any family members with you to (city). You can be reimbursed for respite care services in your home community to enable you to leave your children at home. Let us know if you have any questions about accessing respite care.**

**You must return the contract and profile to us by (date). We will send you additional meeting details after that date. If we don't hear from you by that time, we will assume you are no longer interested in participating in the program and we will add someone from our list of selected alternates.**

**We have enclosed (booklets, reading materials, etc.) for you to read **prior to** our first session on history. Yes, your homework assignments are already beginning! We will have a lot of reading material through the course of the program, so it is best not to get behind.**

**Again, on behalf of (sponsoring agency), we extend sincere congratulations on your being selected for this Partners class. It will not only be hard work, but lots of fun, too. If you have any questions or concerns prior to our (month) meeting, please contact me (or staff person). We are looking forward to meeting you in (month).**

**Cordially,**

**(Partners Coordinator and/or Sponsoring Agency Representative)**



# Partners in Policymaking

## *Letter for Alternates*

(On Your Letterhead)

Date

**SAMPLE**  
**Modify as Necessary**

Name  
Address  
City

Dear (Applicant):

Thank you for submitting an application for Partners in Policymaking. Although your application was rated highly during the review process, we regret that we were not able to include you in the Partners class this year.

There was a tremendous response to our recruitment efforts this year, yielding (number) applications from all over the state. There were so many outstanding applications, the reviewers had to make very difficult choices seeking a balance of many factors such as geographical location, gender, ethnicity, etc. Unfortunately, we were only able to select (number) individuals for this (year: first, second, etc.) Partners class.

We have developed a list of alternates of those applicants who were favorably reviewed. Your name has been placed on this list. If any of the selected applicants withdraw, the alternates will be contacted for possible replacement. Meanwhile, we will add your name to our mailing list and want to encourage you to apply again next year, in case we are not able to include you this year. Look for the recruitment announcement (aprx. time of year).

(For states in at least second year of Partners.) Rosters of graduates from previous Partners classes are enclosed for your information. We encourage you to network with those who are closest to your area. Many of the Partners have organized support groups or joined other local organizations. They may be able to provide you with helpful information.

Again, thank you for taking the time to submit an application. We hope to have the opportunity to work with you in the future as we strive to improve services and supports for all (state) with developmental disabilities.

Sincerely yours,  
(Partners Coordinator)

# **Partners in Policymaking**

## ***Letter of Non-Acceptance***

(On Your Letterhead)

Date

### **SAMPLE**

### **Modify as Necessary**

Name  
Address  
City

Dear (Applicant):

Thank you for submitting an application for Partners in Policymaking. We regret that you were not selected to be a participant in the Partners program this year.

There was a tremendous response to our recruitment efforts this year, yielding (number) applications from all over the state. There were so many outstanding applications, the reviewers had to make very difficult choices seeking a balance of many factors such as geographical location, gender, ethnicity, etc. Unfortunately, we were only able to select (number) individuals for this (year: first, second, etc.) Partners class.

(For states in at least second year of Partners.) Rosters of graduates from previous Partners classes are enclosed for your information. We encourage you to network with those who are closest to your area. Many of the Partners have organized support groups or joined other local organizations. They may be able to provide you with helpful information.

We will also add your name to our mailing list which will assure that you receive an application next year should you want to apply again. The recruitment announcement will be distributed (aprx. time of year).

Again, thank you for taking the time to submit an application. It is most gratifying that we have so many (state residents) that are committed to improving services and supports for people with developmental disabilities.

Sincerely yours,

(Partners Coordinator)

# **Partners in Policymaking**

## ***Partners Contract***

This agreement is between (Partners in Policymaking or sponsoring/funding agency) and (Trainee).

1. This agreement complies with applicable federal and developmental disabilities laws. This agreement will provide training services that will enable people with developmental disabilities, their families, and guardians to maximize their abilities to advocate for supports and services to increase independence, productivity, and inclusion.
2. Under this agreement, the Trainee agrees to:
  - A. Participate in all eight (8) two-day Partners in Policymaking training sessions and not invite spouses or guests to attend these sessions. Contact (Coordinator's name) in case of medical emergency.
  - B. Arrive and depart at prescribed times: arrive by 12:00 noon on Fridays and not leave before 3:00 PM on Saturdays.
  - C. Complete homework assignments relevant to training materials provided at the training sessions.
  - D. Participate in effectiveness evaluations at the end of each training session.
  - E. Submit estimates of time and expenses for match requirements for the grant which sponsors Partners in Policymaking.
  - F. Demonstrate competencies through actions, i.e. letter writing, phone calls, attendance at local/state meetings, presenting testimony, writing news articles and report these activities on my time/match form.
  - G. Maintain records of contacts relative to, or as a result of, Partners in Policymaking, with news media, public officials, action alerts, service organization and/or community programs, phone calls, public presentations or speeches given, meetings attended, and organizations joined.
  - H. Submit complete reimbursement forms within 20 days of training session.
  - I. Participate in post-training follow-up surveys.
  - J. Choose one major assignment to be completed by (six months after graduation) such as an internship with a public official, monitoring hearings, organizing petition/letter writing campaigns, presenting testimony, or organizing meetings with public officials, etc.

**PARTNERS CONTRACT**  
(continued)

3. In consideration for providing the services listed above, (Partners in Policymaking or sponsoring/funding agency) agrees to authorize payment to the Trainee for the following amount(s):
- A. Travel costs to training sessions for airfare and/or mileage at \$.x per mile.
  - B. Meals required during travel time. Meals will be provided during training sessions.
  - C. Lodging to be provided on double occupancy basis.
  - D. Respite services.
  - E. Personal Assistant/Facilitator services.
  - F. Postage, telephone, and miscellaneous charges specifically related to Partners in Policymaking activities.

The reimbursement amount will be remitted as promptly as possible after receipt of the reimbursement request. Total reimbursement under this agreement may not exceed (dollar amount).

4. In addition, the Partners in Policymaking program agrees to:
- A. Provide, face-to-face, best practices and state-of-the-art information available from national experts in the field of developmental disabilities.
  - B. Provide reading materials, suggestions, and resources to familiarize participants with a wide range of topics related to developmental disabilities and with information specific to identified areas of interest.
  - C. Provide both role play and direct experiences at the local, state, and federal levels to assist participants in the abilities to influence public policy.
5. This agreement is effective on (first day of the month of the first training session) and will continue in effect through (one year from previous date).

For (Partners in Policymaking or  
Sponsoring/Funding Agency)

For the Trainee

\_\_\_\_\_

\_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

**SAMPLE**  
**Modify as Necessary**

# Partners in Policymaking

## Partners Profile

Name \_\_\_\_\_ Phone(s) Home \_\_\_\_\_ Work \_\_\_\_\_

Address \_\_\_\_\_

City/Zip \_\_\_\_\_

**HOTEL** - Reservations will be made on a roommate basis (double occupancy). Participants wishing to room alone (single occupancy) will be required to pay the difference in room rate (aprx. \$25-\$35 extra depending on hotel).

Do you want: Double Occupancy \_\_\_\_\_ Single Occupancy \_\_\_\_\_

Reservations will be made for Friday night only. If you require Thursday night or Saturday night lodging in addition, please explain \_\_\_\_\_

Do you smoke? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you require a non-smoking roommate? Yes \_\_\_\_\_ No \_\_\_\_\_

**ACCESSIBILITY** - If the number of wheelchair accessible sleeping rooms is limited, would you require one? Yes \_\_\_\_\_ No \_\_\_\_\_ Other accommodations? (please describe) \_\_\_\_\_

Do you need personal care assistant services? Yes \_\_\_\_\_ No \_\_\_\_\_

Will you be bringing a personal care assistant with you? Yes \_\_\_\_\_ No \_\_\_\_\_

If so, do you want your personal care assistant to room with you? Yes \_\_\_\_\_ No \_\_\_\_\_

**MEALS** - Participants will be provided with Friday dinner and Saturday breakfast and lunch during the training sessions. If you have special dietary needs, please describe: \_\_\_\_\_

**TRAVEL** - Will you be driving or flying to (city)? \_\_\_\_\_

Do you need assistance with accessible transportation from the airport to the hotel?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, are you registered with (city's paratransit service)? Yes \_\_\_\_\_ No \_\_\_\_\_

Please return this form with your Training Agreement by (date).

**SAMPLE**  
**Modify as Necessary**

**Partners in Policymaking**  
***Partners Instruction Letter Prior to First Session***  
(On Your Letterhead)

**SAMPLE**  
**Modify as Necessary**

**DATE:** (Should be aprx. 1 month in advance of meeting date)

**TO:** PARTNERS IN POLICYMAKING

**FROM:** (Coordinator's Name)

**RE:** (Date of first session) Meeting

Our first Partners in Policymaking session will be at the (name of hotel, address, and telephone number), in (city), (dates). We will begin registration at 12:00 noon and the session will start promptly at 12:30 PM. We will not be providing lunch on Friday, so please plan to eat prior to 12:30. The rest of your meals will be provided. As noted on the enclosed agenda, we should wrap up by 3:00 PM on Saturday.

If you requested advance purchase of your plane tickets, we will be in touch with you individually. If you will be on a reimbursement basis, please plan to make your own travel arrangements. We will go over the details of reimbursement on (date of meeting). Please purchase the lowest available airfare if you are making your own arrangements.

The (hotel) does/does not have a shuttle service from the airport. (Detail what transportation options are from the hotel to the airport, e.g. hotel or other shuttle, taxi, bus, etc. Include information on schedules, estimated time of trip, fares, etc.) Be sure to save your receipts to turn in with your reimbursement form. If you need accessible transportation from the airport, we will be in contact with you individually.

For those of you who are driving, a map to the (hotel) is enclosed. Free parking is available for guests of the hotel. Official check-in time is (time). The hotel will have a rooming list and will assign you accordingly. If rooms are available before check-in time, they will provide early check-in. The deadline for check-out is (time). As a reminder, if you have any questions about hotel arrangements, please call me directly at (phone number).

A roster for your class is enclosed. I'm looking forward to a great year and cannot wait to meet all of you in (month). In the meantime, please call if you have any questions or concerns.

**Encl.:** Agenda, Map, Roster

# Partners in Policymaking *Initial Survey*

I.D. Number \_\_\_\_\_ Date \_\_\_\_\_

**This survey is an effort to measure your advocacy activities *prior* to your participation in the Partners in Policymaking program. Please answer the questions to the best of your ability, providing estimates when necessary. Participation is voluntary.**

1. During the past calendar year, and prior to your participation in the Partners in Policymaking program, did you ever contact local, state, or national public officials regarding your needs or the needs of a family member with a disability?

**(Check all that apply.)**

- Yes, National Estimated number \_\_\_\_\_
- Yes, State Estimated number \_\_\_\_\_
- Yes, Local:
  - City Estimated number \_\_\_\_\_
  - County Estimated number \_\_\_\_\_
  - School Dist. Estimated number \_\_\_\_\_

2. If you answered yes to #1, please indicate the type of contacts (letters, phone calls, office visits) and estimate the number of contacts made during the past calendar year. **(Check all that apply.)**

- Letters Estimated number \_\_\_\_\_
- Phone Calls Estimated number \_\_\_\_\_
- Office Visits Estimated number \_\_\_\_\_

3. What other opportunities have you had, prior to the Partners program, to advocate for yourself or other persons with disabilities or to educate the public regarding the rights or needs of persons with disabilities during the past calendar year? **(Check all that apply.) Also, please evaluate your current competency for each activity.**

	Excellent	Good	Fair	Poor
<input type="checkbox"/> Testified at a public hearing Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> Presentation to parent groups Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> Presentation at a conference Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> Service on a committee Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> TV or radio appearances Estimated number _____	_____	_____	_____	_____

**INITIAL SURVEY**  
(continued)

**Continuation of #3:**

Excellent      Good      Fair      Poor

<input type="checkbox"/>	Published articles/letters to editor Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/>	Planned/appeared at press conf. Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/>	Other: Comments _____				
<hr/>					
<hr/>					

4. Please evaluate your advocacy skills, for yourself or for a family member with a disability, prior to the Partners program.

- My advocacy skills were excellent.
- My advocacy skills were good.
- My advocacy skills were fair.
- My advocacy skills were poor.

5. Prior to your participation in the Partners program, were you able to advocate for appropriate services for yourself or family member with a disability?

- Yes, most of the time.
- Yes, some of the time.
- No, have not been able to advocate for appropriate services.

6. Do you expect to be better able to receive appropriate services as a result of the skills and information learned from the Partners program?

- Definitely, yes.
- Yes, somewhat.
- Probably not.
- Definitely, no.

7. What do you expect to gain as a result of your participation in the Partners program?

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8. Place of residence:

- Urban
- Suburban
- Rural

9. Income

- Less than \$12,000
- \$12,000 - \$19,999
- \$20,000 - \$29,999
- \$30,000 - \$39,999
- \$40,000 - \$49,999
- \$50,000+

10. Level of Education

- Less than High School
- High School Graduate
- 1 to 3 Years of College
- Four Years of College
- Partial Graduate Work
- Master's Degree
- Doctoral Degree
- Other \_\_\_\_\_

11. Type of Disability

Yourself \_\_\_\_\_

\_\_\_\_\_

Family Member \_\_\_\_\_

\_\_\_\_\_

12. Ethnicity

- African American
- Native American
- Hispanic
- Caucasian
- Southeast Asian
- Other \_\_\_\_\_

**INITIAL SURVEY**  
(continued)

13.  Female  
 Male

14. Age

- Under 20  
 21-29  
 30-39  
 40-49  
 50 +

Thank you for your assistance in this survey. Please return this evaluation in the self-addressed envelope as soon as possible.

**SAMPLE**  
**Modify as Necessary**

**1993 Partners in Policymaking National Academy**  
**The Stouffer Hotel**  
**Austin, Texas**  
**May 20-22, 1993**

**SECTION III - THE SESSIONS**  
**Table of Contents**

(ND on documents means "No Date.")

This portion of the notebook details the competencies which Partners are expected to achieve. The "What to Teach, How to Teach, Who Can Teach?" pages provide the basics to help Coordinators develop their curriculum. Competencies are cross-referenced to subject matter, methods of teaching, homework, and appropriate speakers. Copies of monthly agendas and homework/readings from Texas detail an entire year of Partners.

Sample letters to speakers are also provided in this section. Careful communication with speakers is essential to a successful presentation. Little details not handled properly can cause big problems during the session! The "Coordinator's Checklist" can be the beginning of a carefully planned, worry-free session. Additional help can be found in "A Primer," beginning on page 11, in Section I of this notebook, and in the "Curriculum, Parts I and II."

The contents of this section include:

Competencies	Page 49
What to Teach, How to Teach, Who Can Teach?	Page 51
1992-93 Session Agendas (TX)	Page 75
Reading/Homework Assignments (TX)	Page 85
Directory of National Speakers	Page 91
Speaker's Confirmation Letter	Page 99
Speaker's Contract	Page 100
Speaker's Information Checklist	Page 101
Coordinator's Checklist	Page 102

# 1993 Partners in Policymaking National Academy

For Your Notes:

# Partners in Policymaking

## **COMPETENCIES**

**(NOTE:** Please cross-reference to the "Curriculum, Parts I and II" when assembling your program.)

**In a quality model of Partners in Policymaking, graduates will be able to:**

- Describe the history of services for, and perceptions of, people with developmental disabilities.
- Describe significant contributions of the parents' movement.
- Describe the history of the self-advocacy and independent living movements.
- Describe the reasons for quality inclusive education.
- Outline specific strategies to achieve inclusion and quality education.
- Describe the importance of supported, competitive employment opportunities.
- Describe the importance of whole life planning for people with developmental disabilities.
- Demonstrate a knowledge of family support and Medicaid waivers.
- Demonstrate a knowledge of the case management system and what services may be available.
- Understand the types of supports necessary for creating a positive home environment.
- Understand the reasons for and the importance of proper positioning techniques for people with disabilities.
- Describe examples of state-of-the-art technologies for people with severe disabilities.
- Describe a vision for the year 2000 (and beyond) for people with disabilities.
- Describe how a bill becomes a law at both the state and federal levels.
- Identify critical federal issues and the process by which they can personally address their concerns.

**COMPETENCIES**  
(continued)

- Draft and deliver testimony for legislative hearings.
- Demonstrate how to meet a public official and express concerns.
- Demonstrate proper procedures for running a meeting.
- Demonstrate successful techniques for advocating for services to meet the needs of unserved and underserved individuals.
- Identify strategies for beginning and sustaining grass roots level organizing.
- Identify when and how to use the media to effectively promote their issues.

# Partners in Policymaking Content

## **WHAT TO TEACH, HOW TO TEACH, WHO CAN TEACH?**

On the following pages are competencies Partners are expected to learn and information on teaching methods to achieve those competencies. Each page lists what to teach (the competencies), suggestions for how to teach, and a listing of who can teach the subject(s). As mentioned previously, a quality model of Partners in Policymaking will cover eight weekends. Since there are more than eight topics listed below, some of the topics will be combined.

Competencies, methods of teaching, and suggested speakers are detailed for these topic areas:

- History
- Education
- Supported Employment/Living, and Inclusive Communities
- State Legislation
- Federal Legislation
- Vision
- Family Support and Medicaid Waivers
- Case Management and Service Coordination
- Technology
- Community Organizing
- Advocacy
- Parliamentary Procedure

**Suggested Sequencing:** History should be the very first session, followed by Education, and Supported Employment/Living and Inclusive Communities. History lays the foundation for the rest of the sessions. Education and Supported Employment/Living and Inclusive Communities are critically important to the parents and consumers in Partners.

Community Organizing, Advocacy, and Parliamentary Procedure should be at the end of the Partners year. After participants have become familiar with the issues, they are ready to learn **what** to advocate and organize for, and **how** to run the meetings they're becoming involved with. Other topics can be scheduled in the middle of the Partners year in a way that fits your state.

**Suggested Groupings:** History, Education, and State Legislation are stand alone sessions with no other topics covered during these three different trainings. Combinations of topics can be tailored to meet the needs of your state. As you group topics to create a session, keep in mind the relation of the topics to each other, the sequencing of the entire year's sessions, speakers, and the amount of time needed to effectively cover the topic, etc. As you plan your year, you will see that some topics complement each other while others do not.

# 1993 Partners in Policymaking National Academy

For Your Notes:



# Partners in Policymaking Content

## **HISTORY**

*A Stand Alone Topic*

### **I. WHAT TO TEACH?**

**COMPETENCY 1:** Describe the history of services for, and perceptions of, people with developmental disabilities.

**COMPETENCY 2:** Describe significant contributions of the parents' movement.

**COMPETENCY 3:** Describe the history of the self-advocacy and independent living movements.

**(Note:** History competencies should be grouped during the same session and should be the first session.)

### **II. HOW TO TEACH?**

- A. History tends to be a presentation with slides or overheads by a national speaker.
- B. The major concepts of history appear in Sections I and II of the "Curriculum, Concept Highlights, Part I."
- C. The handouts are included in the "Curriculum, Collection of Readings, Part II."
- D. There are also videos available on People First and Independent Living that can supplement this session.
- E. Homework can include visits to an institution and an Independent Living Center.

### III. WHO CAN TEACH?

\*Indicates the person has presented at Partners at least once.  
Presenters are listed in alphabetical order.  
Always have a back-up presenter.

**A. National Presenters - History of Services and Perceptions:**

1. Guy Caruso\*
2. Phil Ferguson
3. Michael Kendrick
4. Ed Skarnulis\*
5. Colleen Wieck\*

**B. National Presenters - History of the Parents' Movement:**

1. Elizabeth Boggs\*
2. Gunnar Dybwad\*
3. Lotte Moise\*
4. Dolores Norley\*
5. Candy Sheehan\* (Partners graduate)
6. Patty McGill Smith\*
7. Kathie Snow\* (Partners graduate)

**C. National Presenters - History of Independent Living:**

1. Lex Frieden
2. Judy Heumann\*
3. June Kailes\*
4. Margaret Nosek\*
5. Ed Roberts\*
6. Irv Zola

**D. National Presenters - History of People First:**

1. Debby Allen\*
2. Michael Kennedy\*
3. Connie Martinez\*
4. T. J. Monroe
5. Nancy Ward\*
6. Patrick Worth\*

**E. Selecting Presenters Within Your State:**

1. Seek individuals who have a historical perspective, but are active, up-to-date, and can speak with a national perspective.
2. Students of Wolfensberger have an excellent background in history of services.
3. Independent Living Center directors must understand the concept of consumer control.

# Partners in Policymaking Content

## **EDUCATION**

*A Stand Alone Topic*

### **I. WHAT TO TEACH?**

**COMPETENCY 1:** Describe the reasons for quality inclusive education.

**COMPETENCY 2:** Outline specific strategies to achieve inclusion and quality education.

**(Note:** Education is a primary interest of families of young children. This topic should be scheduled as early as possible in the year.)

### **II. HOW TO TEACH?**

- A. A presentation of "what's possible?" and the values of inclusion can be given with slides by a national speaker.
- B. The major concepts of education appear in Section III of the "Curriculum, Concept Highlights, Part I."
- C. The handouts are included in the "Curriculum, Collection of Readings, Part II."
- D. This session should provide time for roundtable discussions with key individuals from the State Department of Education.
- E. This session should provide an opportunity for practicing advocacy and assertiveness skills at an IEP meeting.
- F. This session should also address early intervention needs and higher education needs depending upon the composition of the group.
- G. Homework can include evaluating quality IEPs and/or assessing the level of inclusion in local schools.
- H. Many videos are available about inclusive education.

### **III. WHO CAN TEACH?**

\*Indicates the person has presented at Partners at least once.  
Presenters are listed in alphabetical order.  
Always have a back-up presenter.

#### **A. National Presenters - The "Whys" of Inclusive Education:**

1. Lou Brown\*
2. Barbara Buswell\*
3. Mary Falvey\*
4. George Flynn
5. Alison Ford
6. Marsha Forest
7. Sharon Freagon
8. Norman Kunc
9. Ian Pumpian\*
10. Mara Sapon Shevin
11. Jeff Strully\*
12. Jacque Thousand
13. Terri Vandercook
14. Rich Villa

#### **B. National Presenters - Strategies and "How to Do Inclusive Education" and "How to be Assertive in Team Meetings:"**

1. Barbara Buswell\*
2. Charlotte Des Jardins\*
3. June Downing
4. David Hancox\*
5. Linda Kjerland\* (especially early intervention)
6. Kay Lambert\*
7. Beth Shaffner\*

#### **C. National Presenters - Testimonials: (The following are all Partners graduates.)**

1. Lettitia Clay\*
2. Candy Sheehan\*
3. Kathie Snow\*

#### **D. Selecting Presenters Within Your State:**

1. Does the person belong to SAFE (Schools Are For Everyone) or the TASH Education Committee or a Statewide Inclusive Education Network?
2. Some states have projects that are working on inclusive education issues. Make sure this session creates opportunities for Partners to meet as many state resource people as possible.

# Partners in Policymaking Content **SUPPORTED EMPLOYMENT/LIVING INCLUSIVE COMMUNITIES**

***This topic can be combined with another, such as Federal Legislation. If combined, cross-reference to the other topic's competencies.***

## **I. WHAT TO TEACH?**

**COMPETENCY 1:** Describe the importance of supported, competitive employment opportunities for people with disabilities.

**COMPETENCY 2:** Describe the importance of whole life planning for people with developmental disabilities.

## **II. HOW TO TEACH?**

- A. Presentations (slide shows, videos, overheads) will be necessary as national presenters address "what's possible" in the above areas.
- B. Small group exercises could teach personal futures planning and/or similar whole life methods.
- C. Whole life planning or personalized planning can be delivered by a presentation of the concepts and use of the booklet, *It's Never too Early, It's Never too Late*.
- D. Concepts are included in Sections IV, V, and VIII of the "Curriculum, Concept Highlights, Part I."
- E. Handouts are included in the "Curriculum, Collection of Readings, Part II."
- F. Homework can include a visit to sheltered employment and supported employment sites and a visit to a supported living or "a home of your own" location.

### **III. WHO CAN TEACH?**

- \* Indicates the person has presented at Partners at least once.  
Presenters are listed in alphabetical order.  
Always have a back-up speaker.

#### **A. National Presenters - Supported Employment:**

1. Mike Callahan
2. Dale DiLeo
3. Cary Griffin
4. Jan Nisbet
5. Tom Powell\*
6. Ian Pumpian\*

#### **B. National Presenters - Supported Living:**

1. Derrick Dufresne
2. Gail Jacob
3. Jay Klein\*
4. Bob Laux
5. Elaine Ostroff

#### **C. National Presenters - Whole Life Planning:**

1. Jerry Adams\*
2. Beth Mount
3. Jack Pealer\*
4. Jane Wells

#### **D. National Presenters - Inclusive Communities:**

1. Jerry Adams\*
2. Derrick Dufresne
3. Gail Jacob
4. John O'Brien\*
5. Connie Lyle O'Brien
6. Ed Roberts\*
7. Judith Snow\*

#### **E. Selecting Presenters Within Your State:**

There are probably many resource people within your state who are active in supported employment, supported living, and personal futures planning.

# Partners in Policymaking Content

## **STATE LEGISLATION**

*A Stand Alone Topic*

### **I. WHAT TO TEACH?**

**COMPETENCY 1:** Describe how a bill becomes a law at the state level.

**COMPETENCY 2:** Draft and deliver testimony for legislative hearings.

**(Note:** This entire session should be dedicated to state legislative issues.)

### **II. HOW TO TEACH?**

- A. This session focuses on your state legislative process and the experience of delivering testimony.
- B. Concepts are included in Section IX of the "Curriculum, Concept Highlights, Part I."
- C. Handouts are included in the "Curriculum, Collection of Readings, Part II."
- D. Partners should have a comprehensive tour of the Capitol to become familiar with and comfortable with the building.
- E. Partners should sign up for Committee schedules, weekly summaries, and receive a legislative directory.
- F. Try to get a representative from the Governor's Office to greet Partners and to encourage them to apply for positions appointed by the Governor.
- G. Invite someone from your Legislature who can explain the process of a bill becoming a law.
- H. Invite Legislators as early as possible to conduct "mock hearings" to enable every Partner to testify and demonstrate proper etiquette. If possible, have the hearing in one of the Capitol chambers instead of the hotel meeting room.
- I. Invite four experienced lobbyists to serve as coaches to assist and support the development of testimony by Partners. The coaches must understand the purpose of the session.

**STATE LEGISLATION**  
(continued)

- J. Partners should receive many handouts, such as the legislative directory, legislative information on a bill becoming a law, bills/legislative proposals, and any/all pertinent information concerning the State Legislature.

## **WHO CAN TEACH?**

- \* Indicates the person has presented at Partners at least once.  
Presenters are listed in alphabetical order.  
Always have a back-up presenter.

**A. National Presenters - State Legislative Issues:**

1. Allan Bergman\*
2. Hank Bersani\*
3. Dohn Hoyle\*
4. Carmen Quesada\*
5. Carol Risley
6. Fran Smith\*
7. Cathy Ficker Terrill
8. Colleen Wieck\*

**B. Selecting Presenters Within Your State, consider:**

1. Governor's Office
2. Legislative staff
3. Lobbyists
4. Legislators
5. Disability lobbyists



# Partners in Policymaking Content

## **FEDERAL LEGISLATION**

***For a more comprehensive session, this topic can be combined with another, such as Supported Employment/Living, Family Support & Medicaid Waivers, and/or Vision. When combined, cross-reference to the other topic's competencies.***

### **I. WHAT TO TEACH?**

**COMPETENCY 1:** Describe how a bill becomes a law at the federal level.

**COMPETENCY 2:** Identify critical federal issues and the process by which one can personally address concerns.

**COMPETENCY 3:** Demonstrate how to meet a public official and express concerns.

### **II. HOW TO TEACH?**

- A. A presentation by a national speaker, using appropriate slides and/or overheads, will demonstrate the legislative processes within the federal government.
- B. Current and future federal issues affecting people with disabilities need to be taught to Partners.
- C. Invite Congressional staff to attend this session in order to role play "meeting a public official," and to learn protocol and etiquette.
- D. The concepts are included in Section IX of the "Curriculum, Concept Highlights, Part I."
- E. Handouts are in the "Curriculum, Collection of Readings, Part II."
- F. Homework can include Partners making a call or a visit to the local office of their U.S. Senators or Representative after this session.

### **III. WHO CAN TEACH?**

\*Indicates the person has presented at Partners at least once.  
Presenters are listed in alphabetical order.  
Always have a back-up presenter.

**A. National Presenters - Federal Issues:**

1. Allan Bergman\*
2. Hank Bersani\*
3. Christopher Button (Ms.)
4. Bob Williams

**B. National Presenters - Meeting a Public Official:**

1. Hank Bersani\*
2. Fran Smith\*
3. Colleen Wieck\*

**C. Selecting Presenters Within Your State:**

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

# Partners in Policymaking Content **VISION**

***This topic must be combined with another: Service Coordination, Family Support & Medicaid Waivers, Federal Legislation, etc. When combined, cross-reference to the other topic's competencies.***

## **I. WHAT TO TEACH?**

**COMPETENCY:** Describe a vision for the Year 2000 (or beyond) for people with disabilities.

## **II. HOW TO TEACH?**

- A. Vision building is a participatory small group exercise involving a "high school reunion" and an opportunity to build a collective vision for the Year 2000 or beyond.
- B. Vision building - learning to "Dream Big" - is critical for Partners to learn before they can create change.
- C. The Joel Barker video, *The Power of Vision*, can be a helpful tool.
- D. Concepts of vision building are included in Section IX of the "Curriculum, Concept Highlights, Part I."
- E. Handouts are included in the "Curriculum, Collection of Readings, Part II."

## **III. WHO CAN TEACH?**

- \* Indicates the person has presented at Partners at least once. Presenters are listed in alphabetical order. Always have a back-up presenter.

### **National Presenters - Vision Building:**

1. Hank Bersani\*
2. Fran Smith\*
3. Colleen Wieck\*

# Partners in Policymaking Content

## **CASE MANAGEMENT SERVICE COORDINATION**

***This topic can be combined with another, such as Family Support and Medicaid Waivers or Supported Employment/Living. When combined, cross-reference to the other topic's competencies.***

### **I. WHAT TO TEACH?**

**COMPETENCY:** Demonstrate a knowledge of the case management system and what services may be available.

### **II. HOW TO TEACH?**

- A. Service coordination/case management requires a presentation about the state laws and regulations that govern this service and how people can access the service. (In some states, this might be a function of county governments and/or other agencies. In other states, a case management program may not be in place; delivery of services might be the topic instead.)
- B. Small group exercises could focus on "how to ensure better delivery of services, family-focused case management, etc.," depending on what is happening in your state.
- C. The major concepts of case management appear in Section VI of the "Curriculum, Concept Highlights, Part I."
- D. The handouts are included in the "Curriculum, Collection of Readings, Part II."
- E. Homework after this session could include Partners investigating how the needs of their families can be met through the state's system. Partners could also meet and interview a Case Manager.

### **III. WHO CAN TEACH?**

#### **Selecting Presenters From Within Your State:**

Invite representatives from the agencies who oversee case management and service coordination.

# Partners in Policymaking Content

## **FAMILY SUPPORT & MEDICAID WAIVERS**

*This topic can be combined with another, such as Supported Employment, Vision, and/or Federal Legislation. When combined, cross-reference to the other topic's competencies.*

### **I. WHAT TO TEACH?**

**COMPETENCY 1:** Demonstrate a knowledge of family support and Medicaid waivers.

**COMPETENCY 2:** Understand the types of support necessary for creating a positive home environment.

### **II. HOW TO TEACH?**

- A. Presentations (slide shows, videos, overheads) will be necessary as national presenters address "what's possible" in the above areas.
- B. Participants need to be aware of any state Family Support laws and the Family Support movement at the federal level.
- C. Concepts are included in Sections IV and VIII of the "Curriculum, Concept Highlights, Part I."
- D. Handouts are included in the "Curriculum, Collection of Readings, Part II."

### **III. WHO CAN TEACH?**

- \* Indicates the person has presented at Partners at least once.  
Presenters are listed in alphabetical order.  
Always have a back-up presenter.

- A. **National Presenters - Family Support:**
  - 1. John Agosta
  - 2. Allan Bergman\*
  - 3. Hank Bersani\*
  - 4. Val Bradley\*
  - 5. Tom Powell\*
  - 6. Fran Smith\*
  - 7. Rud or Ann Turnbull

**FAMILY SUPPORT & MEDICAID WAIVERS**  
(continued)

**B. Selecting Presenters Within Your State:**

Investigate your state's family support laws/programs and how Medicaid waivers are implemented. Locate a speaker from the agency overseeing these services.

# Partners in Policymaking Content **TECHNOLOGY**

*This topic can be combined with another. When combined, cross-reference to the other topic's competencies.*

## **I. WHAT TO TEACH?**

**COMPETENCY 1:** Understand the reasons for and the importance of proper positioning techniques for people with disabilities.

**COMPETENCY 2:** Describe examples of state-of-the-art technologies for people with severe disabilities.

## **II. HOW TO TEACH?**

- A. Presentations (slide shows, videos, overheads, and demonstrations) will illustrate the critical "why" and "how" of technology and positioning.
- B. The major concepts of technology appear in Section VII of the "Curriculum, Concept Highlights, Part I."
- C. The handouts are included in the "Curriculum, Collection of Readings, Part II."
- D. Many videos are available on technology from Apple Computer, President's Committee on Employment of People with Disabilities, Americans with Disabilities Act regional resource centers, as well as from other sources.
- E. Homework can include a visit to a technology center or a rehabilitation technology laboratory.

### **III. WHO CAN TEACH?**

- \* Indicates the person has presented at Partners at least once.  
Presenters are listed in alphabetical order.  
Always have a back-up presenter.

**A. National Presenters - Positioning:**

1. Joan Bergman\*
2. Pip Campbell\*
3. Karen Green-McGowan\*
4. Jennifer York

**B. National Presenters - Technology:**

1. Richard Dodds\*
2. Robert Stack\*

**C. Selecting Presenters Within Your State:**

Invite your Technology Council to discuss how to access technology resources within your state. Find out if your state has a technology center, a computer lending program, and/or a mobile vehicle.



# Partners in Policymaking Content

## **COMMUNITY ORGANIZING**

*This topic can be combined with another, such as Advocacy, Parliamentary Procedure, etc. When combined, cross-reference to the other topic's competencies.*

### **I. WHAT TO TEACH?**

**COMPETENCY 1:** Identify strategies for beginning and sustaining grass roots level organizing.

**COMPETENCY 2:** Identify when and how to use the media to effectively promote issues.

### **II. HOW TO TEACH?**

- A. To teach community organizing, small group exercises are a must. Select an issue that's discrete, small, and winnable. Have the groups plan a full campaign that includes a variety of tactics such as using the media, organizing meetings, and direct confrontations.
- B. The major concepts of community organizing appear in Section IX of the "Curriculum, Concept Highlights, Part I."
- C. The handouts are included in the "Curriculum, Collection of Readings, Part II."
- D. Homework could include joining a coalition which deals with a social justice issue. Pick a local project in your home community that's winnable. Build alliances with others.

### **III. WHO CAN TEACH?**

\*Indicates the person has presented at Partners at least once.

Presenters are listed in alphabetical order.

Always have a back-up presenter.

- A. **National Presenters - Community Organizing:**
  - 1. Don Barr\*
  - 2. Dohn Hoyle\*
  - 3. Dan Lopp\*
  - 4. Richard Male\*
  - 5. Carmen Quesada\*

COMMUNITY ORGANIZING  
(continued)

- B. Selecting Presenters Within Your State:**  
Search out community organizers associated with churches, poverty groups, unions, or social justice organizations.

# Partners in Policymaking Content **ADVOCACY**

*This topic can be combined with another, such as Community Organizing, Parliamentary Procedure, etc. When combined, cross-reference to the other topic's competencies.*

## **I. WHAT TO TEACH?**

**COMPETENCY:** Demonstrate successful techniques for advocating for services to meet the needs of unserved and underserved individuals.

## **II. HOW TO TEACH?**

- A. This session focuses on Partners connecting with local advocacy organizations and learning strategies for successful advocacy.
- B. Representatives can present a round-table discussion on their advocacy organizations.
- C. Small group exercises can help Partners learn techniques of successful advocacy.
- D. The major concepts of advocacy appear in Section IX of the "Curriculum, Concept Highlights, Part I."
- E. The handouts are included in the "Curriculum, Collection of Readings, Part II."
- F. Have presenters bring literature from their organizations for all Partners.

## **III. WHO CAN TEACH?**

### **Selecting Presenters From Within Your State:**

Invite representatives from a variety of state disability advocacy organizations.

# Partners in Policymaking Content

## **PARLIAMENTARY PROCEDURE**

*This topic can be combined with another, such as Advocacy or Community Organizing. When combined, cross-reference to the other topic's competencies.*

### **I. WHAT TO TEACH?**

**COMPETENCY:** Demonstrate proper procedures for running a meeting.

### **II. HOW TO TEACH?**

- A. This session offers "how-to" information on boards, meetings, and parliamentary procedure.
- B. Small group exercises will help the participants practice skills for planning and conducting successful meetings.
- C. The major concepts of meeting strategies appear in Section IX of the "Curriculum, Concept Highlights, Part I."
- C. The handouts are included in the "Curriculum, Collection of Readings, Part II."

### **III. WHO CAN TEACH?**

\*Indicates the person has presented at Partners at least once.

Presenters are listed in alphabetical order.

Always have a back-up presenter.

- A. **National Presenters - Boards and Parliamentary Procedure:**
  - 1. Susan Scribner\*
  - 2. Don Sikkink\*

# Partners in Policymaking Content

## OTHER TOPICS TO TEACH AND WHO CAN TEACH THEM

### **A. Understanding Behavior**

1. Wade Hitzing\*
2. Pat Juhrs
3. Herb Lovett\*
4. Luanna Meyer
5. Joe Schiappacasse\*

### **B. Facilitated Communication**

1. Anne Donnellan
2. Sue Lehr

### **C. Letting Go**

1. Betty Pender\*

# 1993 Partners in Policymaking National Academy

For Your Notes:

**PARTNERS IN POLICYMAKING**

**Session I: History**

**September 11-12, 1992**

**Stouffer Hotel  
9721 Arboretum Blvd.  
Austin, Texas**

**Friday, September 11, 1992**

- 12:00 p.m. - 12:30 p.m.    **Registration - *San Antonio Room***
- 12:30 p.m. - 1:00 p.m.    **Welcome  
Lee Veenker, Chair and  
Roger Webb, Executive Director, Texas  
Planning Council for Developmental Disabilities**
- 1:00 p.m. - 3:00 p.m.    **History of Disabilities Movement  
Colleen Wieck, Ph.D., Executive Director  
Minnesota Governor's Planning Council on  
Developmental Disabilities**
- 3:00 p.m. - 3:30 p.m.    **Break**
- 3:30 p.m. - 5:00 p.m.    **History of Independent Living Movement  
Ed Roberts, President  
World Institute on Disability**
- 5:00 p.m. - 5:30 p.m.    **Social Time**
- 5:30 p.m. - 7:00 p.m.    **Dinner - *San Marcos Room***
- 7:00 p.m. - 8:00 p.m.    **What is Partners in Policymaking? - *San Antonio Room*  
Colleen Wieck and Texas Partners**
- 8:00 p.m. - 9:00 p.m.    **Introductions**

**Saturday, September 12, 1992**

- 7:30 a.m. - 8:30 a.m.    **Breakfast - *San Antonio Room***
- 8:30 a.m. - 10:30 a.m.   **History of the Parent Movement  
Kathie Snow, Peak Parent Center  
Colorado Springs, CO**

**Partners in Policymaking  
Agenda  
Page 2**

- 10:30 a.m. - 11:30 a.m. Ground Rules  
Jopie Smith**
- 11:45 a.m.- 1:00 p.m. Lunch - *San Marcos Room***
- 1:00 p.m. - 2:30 p.m. History of People First Movement - *San Antonio Room*  
Charlene Jones, Capitol People First  
California**
- A Personal Perspective  
Connie Martinez, Self-Advocate  
Sacramento, California**
- 2:30 p.m. - 3:00 p.m. Evaluations**



**PARTNERS IN POLICYMAKING**

**Session II: Education - Inclusion and Quality**

**October 9-10, 1992**

**Stouffer Hotel  
9721 Arboretum Blvd.  
Austin, Texas**

**Friday October 9, 1992**

- 12:00 p.m. - 12:30 p.m. Registration - *San Antonio Room***
- 12:30 p.m. - 4:00 p.m. Achieving Inclusive Education  
Lou Brown, Ph.D.  
University of Wisconsin**
- 4:00 p.m. - 5:15 p.m. Preparation for Education Roundtable  
David Hancox  
Minnesota Governor's Planning Council on  
Developmental Disabilities**
- 5:15 p.m. - 5:30 p.m. Break/Social Time**
- 5:30 p.m. - 6:45 p.m. Dinner - *Trinity B***
- 6:50 p.m. - 9:00 p.m. Texas Ed. Agency Roundtable: - *San Antonio Room***
- Gene Lenz - General Directions/Goals  
Al Stewart - Early Childhood Education  
Ron DiOrio - Secondary/Transition  
Claudia Knowles - Complaints  
Carol Edwards - Funding  
Forrest Novy - LRE/Inclusion; Multicultural Issues;  
Nondiscriminatory Assessment; Autism/TBI**

**Saturday, October 10, 1992**

- 7:30 a.m. - 8:30 a.m. Breakfast - *San Antonio Room***
- 8:30 a.m. - 11:30 a.m. The How-To's of Advocacy in Team Meetings  
David Hancox**
- 11:30 a.m. - 12:45 p.m. Lunch - *Sabine Room***
- 12:45 p.m. - 2:30 p.m. The Texas Perspective - *San Antonio Room*  
Kay Lambert & Lettitia Clay**
- 2:30 p.m. - 3:00 p.m. Wrap-up and Evaluation**

**PARTNERS IN POLICYMAKING**

**Session III: Supported Employment, Facilitated Communication, and Supported Living**

**November 13-14, 1992**

**Wyndham San Antonio  
9821 Colonnade Blvd.  
San Antonio, Texas**

**Friday November 13, 1992**

- 12:00 p.m. - 12:30 p.m.    **Registration - *La Joya Ballroom***
- 12:30 p.m. - 5:00 p.m.    **Supported Employment  
Ian Pumpian, Ph.D.  
San Diego State University**
- 5:00 p.m. - 5:30 p.m.    **Break/Social Time**
- 5:30 p.m. - 6:45 p.m.    **Dinner - *Colonnade Ballroom "C"***
- 6:45 p.m. - 9:00 p.m.    **Facilitated Communication - *La Joya Ballroom*  
Julia Brandt M.A., CCC-SLP  
and  
Kimberly Dixon**

**Saturday, November 14, 1992**

- 7:30 a.m. - 8:30 a.m.    **Breakfast - *La Joya Ballroom***
- 8:30 a.m. - 11:45 a.m.    **Building Inclusive Communities  
Gerald Adams, Executive Director  
Human Services Institute, Columbia, MD**
- 11:45 a.m. - 1:00 p.m.    **Lunch - *La Camellia Restaurant***
- 1:00 p.m. - 2:30 p.m.    **Personal Futures Planning - *La Joya Ballroom*  
Gerald Adams**
- 2:30 p.m. - 3:00 p.m.    **Wrap-up and Evaluation**

**PARTNERS IN POLICYMAKING**

**Session IV: Federal Policy & Legislation**

**January 8-9, 1993**

**Stouffer Austin Hotel  
9721 Arboretum Blvd.  
Austin, Texas**

**Friday January 8, 1993**

- 12:00 p.m. - 12:30 p.m. Registration - *Sabine Room*
- 12:30 p.m. - 1:30 p.m. Memory Lane Exercise
- 1:30 p.m. - 5:00 p.m. National Policy Issues & The Legislative Process  
Fran Smith, National Consultant, Richmond, CA  
and  
Hank Bersani, Community Integration Associates,  
Salem, OR
- 5:00 p.m. - 5:30 p.m. Break/Social Time
- 5:30 p.m. - 7:00 p.m. Dinner - *San Antonio Room*
- 7:00 p.m. - 8:00 p.m. Creating A Vision - *Sabine Room*
- 8:00 p.m. - 9:00 p.m. Legislative Advocacy  
Fran Smith and Hank Bersani

**Saturday, January 9, 1993**

- 7:30 a.m. - 8:30 a.m. Breakfast - *Sabine Room*
- 8:30 a.m. - 11:30 a.m. Preparing to Meet with Congressional Delegation  
Fran Smith and Hank Bersani
- 11:30 a.m. - 12:45 p.m. Lunch - *San Antonio Room*
- 12:45 p.m. - 2:30 p.m. Simulated Visits and Feedback - *Sabine Room*
- 2:30 p.m. - 3:00 p.m. Wrap-up and Evaluation

**PARTNERS IN POLICYMAKING**

**Session V: State Legislative Process**

**February 5-6, 1993**

**Hyatt Regency Austin  
208 Barton Springs Road  
Austin, Texas**

**Friday February 5, 1993**

- 12:00 p.m. - 12:30 p.m. Registration - *Hill Country A-C*
- 12:30 p.m. - 1:15 p.m. A Message From the Governor  
Dr. Pat Cole, Governor Richards' Office
- 1:15 p.m. - 1:45 p.m. The State Budget Crisis  
Laura Smith, Health & Human Services Commission
- 1:45 p.m. - 2:00 p.m. Break
- 2:00 p.m. - 3:30 p.m. What's Important To Know About the  
State Legislative Process?  
Betty Button & Allen Dietz  
Button & Dietz, Inc.
- 3:30 p.m. - 3:45 p.m. Break
- 3:45 p.m. - 5:00 p.m. How To Deliver Testimony  
Mary Jo Magruder & Denise Brady  
Disability Policy Consortium  
and  
Elaine St. Marie, Parent
- 5:00 p.m. - 5:30 p.m. Break/Social Time
- 5:30 p.m. - 7:00 p.m. Dinner - *Texas V & VI*
- 7:00 p.m. - 9:00 p.m. Preparation for Hearing - *Hill Country A-C*  
Mary Jo Magruder & Denise Brady

**Saturday, February 6, 1993**

- 7:00 a.m. - 7:50 a.m. Breakfast - *Hill Country A-C*
- 7:50 a.m. - 8:00 a.m. Board Buses to Capitol
- 8:00 a.m. - 8:30 a.m. Meet in Capitol Extension, Level E1
- 8:30 a.m. - 9:30 a.m. Brief Tour of Capitol Extension
- 9:30 a.m. - 11:30 a.m. Mock Hearing
- 11:30 a.m. - 12:00 p.m. Debriefing

Saturday, February 6, 1993 (continued)

- 12:00 p.m. - 12:15 p.m. Board Buses to Hotel
- 12:45 p.m. - 2:00 p.m. Lunch - *Hill Country A-C*
- 2:00 p.m. - 3:00 p.m. Wrap-Up and Evaluation - *Hill Country A-C*

**PARTNERS IN POLICYMAKING**

**Session VI: Physical Disabilities, Assistive Technology,  
& Challenging Behavior**

**March 5-6, 1993**

**Stouffer Austin Hotel  
9721 Arboretum Blvd.  
Austin, Texas**

**Friday, March 5, 1993**

- 12:00 p.m. - 12:30 p.m. Registration - *San Antonio Room*
- 12:30 p.m. - 4:00 p.m. Positioning for People with Physical Disabilities  
Joan Bergman, Ph.D.  
Professor Emeritus, University of Alabama and  
Assistive Technology Project Coordinator for New Hampshire
- 4:00 p.m. - 5:00 p.m. Photos / Announcements / Sharing
- 5:00 p.m. - 5:30 p.m. Break/Social Time
- 5:30 p.m. - 7:00 p.m. Dinner - *San Marcos Room*
- 7:00 p.m. - 9:00 p.m. Supporting Positive Behavior Change - *San Antonio Room*  
Joe Schiappacasse  
RMRTI, Denver, CO

**Saturday, March 6, 1993**

- 7:30 a.m. - 8:30 a.m. Breakfast - *San Antonio Room*
- 8:30 a.m. - 11:45 a.m. Assessing Technology Needs and Demonstration of Devices  
Robert Stack  
Community Options, Inc.  
Bordentown, N.J.                      Richard Dodds  
United Cerebral Palsy  
Phillipsburg, N.J.
- 11:45 a.m. - 1:00 p.m. Lunch - *Sabine Room*
- 1:00 p.m. - 2:45 p.m. Robert Stack & Richard Dodds (continued) - *San Antonio Room*
- 2:45 p.m. - 3:00 p.m. Wrap-up and Evaluation

**PARTNERS IN POLICYMAKING**

**Session VII: State Bureaucratic Maze, Understanding  
Parliamentary Procedure**

**April 2-3, 1993**

**Hyatt Regency Austin  
208 Barton Springs Road  
Austin, Texas**

**Friday, April 2, 1993**

- 12:00 p.m. - 12:30 p.m.    Registration
- 12:30 p.m. - 4:30 p.m.    Negotiating the Bureaucratic Maze  
Mike Bright    &    Dave Sloane  
ARC/Texas                      Advocacy, Inc.
- 4:30 p.m. - 5:15 p.m.    Meet the Commissioner  
Dick Ladd, Commissioner  
Health & Human Services Commission
- 5:00 p.m. - 5:30 p.m.    Break/Social Time
- 5:30 p.m. - 7:00 p.m.    Dinner
- 7:00 p.m. - 9:00 p.m.    Personal Perspectives on Advocacy  
Ruth Mercer    &    Theda Hoyt  
Northampton, MA              Texas Planning Council

**Saturday, April 3, 1993**

- 7:30 a.m. - 8:30 a.m.    Breakfast
- 8:30 a.m. - 12:30 p.m.    Making Parliamentary Procedure Understandable  
Donald Sikkink, Ph.D.  
Cambridge, MN
- 12:30 p.m. - 1:45 p.m.    Lunch
- 1:45 p.m. - 2:30 p.m.    The Advocacy Role of the DD Council  
Roger Webb, Executive Director  
Texas Planning Council for DD
- 2:30 p.m. - 3:00 p.m.    Wrap-up and Evaluation

**PARTNERS IN POLICYMAKING**

**Session VIII: Community Organizing, Advocacy Organizations,**  
**GRADUATION**

**May 7-8, 1993**

**Hyatt Regency Austin  
208 Barton Springs Road  
Austin, Texas**

**Friday, May 7, 1993**

- 12:00 p.m. - 12:30 p.m. Registration
- 12:30 p.m. - 4:45 p.m. Community Organizing  
Dohn Hoyle  
Washtenaw Association for Community Advocacy  
Ann Arbor, MI
- 4:45 p.m. - 5:15 p.m. Graduation Announcements
- 5:15 p.m. - 5:30 p.m. Break/Social Time
- 5:30 p.m. - 7:00 p.m. Dinner
- 7:00 p.m. - 9:00 p.m. Community Organizing (continued)

**Saturday, May 8, 1993**

- 7:30 a.m. - 8:30 a.m. Breakfast
- 8:30 a.m. - 10:00 a.m. Advocacy Organizations in Texas:  
Disability Policy UCP/TX MHA of TX Transition  
Consortium Task Force
- 10:00 a.m. - 10:15 a.m. Break
- 10:15 a.m. - 11:45 a.m. Advocacy Organizations in Texas:  
ADAPT TX Advocates ARC/TX SAFE
- 11:45 a.m. - 12:30 p.m. Evaluations / Break / Get Ready!
- 12:30 p.m. - 3:00 p.m. Graduation / Reception
- 3:00 p.m. Fond Farewells



**PARTNERS IN POLICYMAKING  
READING/HOMEWORK ASSIGNMENTS**

**SEPTEMBER 1991 - HISTORY**

\*\*\*\*\*  
\* Texas PIP \*  
\* ND - Rec'd. prior to 1993 Academy \*  
\*\*\*\*\*

1. A New Way of Thinking, Minnesota DD Council.
2. Circles of Friends, Perske.
3. "People's Voice" (Speaking For Ourselves of Colorado).
4. "Getting On Board" (Speaking for Ourselves of Colorado Newsletter).
5. New Vision Magazine.
6. "Directions," June, 91.
7. "Best Practice Guidelines for Meeting the Needs of All Students in Local Schools" (Vermont).
8. "Caught in the Continuum: A Critical Analysis of the Principle of the Least Restrictive Environment," Syracuse University.
9. How To Get Services by Being Assertive, Coordinating Council for Handicapped Children.
10. National Parent Network on Disabilities (Brochure).

**OCTOBER 1991 - INCLUSIVE EDUCATION**

1. Test Your School's IQ Integration Quotient (ARC).
2. Parental Check List for Quality Education (Rhode Island DD Council).
3. Action for Inclusion, O'Brien & Forrest.
4. "After Your Graduate, What Will You Do?" (TTTF).
5. Texas Transition Task Force Newsletter.
6. "Supported Employment," Article by Tom Powell.
7. American 2000 Education Reform.
8. "Special Edition," Quarterly Newsletter of Advocacy, Inc. Special Education Staff.
9. "Dreaming, Speaking and Creating What I Know About Community," Judith A. Snow.
10. "Toward Economic Self-Sufficiency & Personal Independence For Students with Disabilities," Texas Education Code.  
"A Plan for Reorganization of the Texas Education Agency."  
Individuals with Disabilities Education Act, Pub. Law 101-476.  
State Board of Education, Subchapter G-Special Education.  
Clarification of Graduation Rule, TEA.  
Memo of Understanding on Transition Planning for Students Enrolled in Special Education, TEA.  
Disability Policy Consortium letter on funding weights in special education.
11. "Futures Planning-Supporting A New Vision."
12. Schools Are For Everyone (Brochure).
13. ARC\Guidelines For Quality Individual Plans (Brochure).
14. It's Never Too Early; It's Never Too Late, Minnesota DD Council.

**ASSIGNMENTS:** ■ Visit A State School, nursing home and/or sheltered workshop prior to next session.  
■ Call America 2000 hotline & voice your concerns on education reform.

## NOVEMBER 1991 - SUPPORTED LIVING/EMPLOYMENT, FAMILY SUPPORTS

1. Texas Interagency Council on Early Childhood Intervention Board Nominations.
2. Texas Planning Council for DD Position Statements.
3. "Issues in the Closure of State Schools in Texas: A Briefing Paper," David Braddock, Ph.D.
4. "Texas Department of Human Services In-Home & Family Support Program."
5. Read My Lips, It's My Choice, Minnesota DD Council.
6. "Changing Paradigms," Jerry Kiracofe.
7. "Regenerating Community," John L. McKnight.
8. "Discovering Community," John O'Brien.
9. "Families Meeting Challenge Promoting Change," Oregon DD Council.
10. Family Support Bulletin, United Cerebral Palsy Association.
11. Staying At Home (Family Support Program through TDHS Brochure).
12. "In-Home & Family Support for Persons with Mental Disabilities", TX MHMR.
13. Community Living Assistance & Support Services (Brochure).
14. List of CLASS Providers.
15. "Home & Community Based Services Program Overview," TX MHMR.
16. CTAT Field Report Summer 1990.
17. "Understanding SSI Work Incentives For People with Disabilities," Patti Roth.
18. "Impairment-Related Work Expenses."
19. "Plans for Achieving Self-Support."
20. "Work Expenses of The Blind."

**ASSIGNMENTS:** Write Governor Richards and Facility Review Task Force to express support of state school closure.

## JANUARY 1992 - FEDERAL POLICY & LEGISLATION

1. "Americans with Disabilities Agenda For Change," (TASH Brochure).
2. "The Americans with Disabilities Act," US Dept of Justice.
3. Word From Washington, "HCFA Awards CSLA to 8 States," and "Part H Reauthorization Signed Into Law."
4. Family Support Bulletin, "Fast Facts on IEPs," and "Myths & Realities."
5. Americans with Disabilities Act Statutory Deadlines.
6. "Lobbying By Letter."
7. "Quality Assurance: Beyond Minimal Compliance," Hank Bersani.
8. ARC Facts: Citizen Monitoring.
9. "Lobbying: By Personal Visit."
10. "Ten Commandments of Lobbying."
11. "Political Power," Hank Bersani, Jr.
12. Action Alert: Town meetings on Health Insurance Crisis.
13. Alert from Texas Planning Council for DD on Facility Review Task Force hearings.
14. "How a Bill Becomes a Law."
15. "Legislative Advocacy," Fran Smith.

JANUARY 1992, cont.

16. Roster of Texas Congressional delegation.
17. "Community Supported Living Arrangements (Medicaid/Title XIX)," TPCDD.
18. "Assertiveness Is..."
19. The Americans with Disabilities Act Communication Accommodations Project, Resource for Voluntary Compliance.
20. All Kids Can Learn: Strategies for Integrated Education, Conference Announcement, PEAK.
21. Making A Difference: Active Participation In The Texas Legislative Process, Betty Button & Allen Dietz.

**ASSIGNMENTS:**

- Attend Town Meetings on Health Insurance Crisis.
- Attend/Testify at Facility Review Hearings.
- Visit Congressperson or staff and send us a copy of thank you letter.

FEBRUARY 1992 - STATE LEGISLATIVE SESSION

1. Accessibility Guide to the Texas State Capitol, TPCDD.
2. Roster of the Seventy-Second Legislature of State of Texas.
3. 1992 Texas Primary Booklet.
4. Order form for The U.S. Congress Handbook for 1992.
5. Alert on Facility Review Task Force Nears Decision on Closure/Consolidation of Texas State Schools, TPCDD.
6. "Briefing Document on Appropriations Issues," TPCDD.
7. Health and Human Services Legislative Appropriations.
8. Testimony to the Joint Committee on Appropriations, TPCDD.
9. "Technological Adaptations to Increase Independence," Robert Stack.
10. Family Support Bulletin, "My Dream IEP Meeting."
11. FY 1991 - HCS Program Providers, TX MHR.
12. "Office of Special Education Programs Clarifies Right to Assistive Technology," UCPA.
13. Letter from United States Department of Education on Public Meetings/OSEP Review.
14. Work Site Scenario, Richard Dodds.

**ASSIGNMENTS:**

- Write to Mock Hearing participants.
- Attend/testify at OSEP Review Meetings.

MARCH 1992 - POSITIONING, CHALLENGING BEHAVIOR, & ASSISTIVE TECHNOLOGY

1. Summer Institute in Integrated Education & Community, McGill University Announcement.
2. Herb Lovett's Relevant Resource List.
3. "Why Do We Bother With Positioning Anyway?," Joan Bergman, Ph.D.
4. University of Alabama Sparks Center Resources.
5. Therapeutic Positioning & Mobility Selected Bibliography, University of Alabama Sparks Center.

## MARCH 1992, cont.

6. Seating and Positioning - A Two Part Series, UCP.
7. "Facilitated Communication," Rosemary Crossley.
8. Disability Policy Consortium Recommendations to Facility Review Task Force.
9. Impact, Feature Issue on Inclusive Education Fall 1991, Institute on Community Integration.
10. Resource Directory, Heath Resource Center.
11. ADA - Your Responsibility as an Employer, EEOC.
12. ADA - Your Employment Rights as an Individual with a Disability, EEOC.
13. ADA - Questions and Answers, EEOC.

**ASSIGNMENTS:** ■Call Governor's Hotline and voice support for Facility Review Task Force Recommendations and get 5 others to do the same.

## April 1992 - NEGOTIATING THE BUREAUCRATIC MAZE, STATE ADVOCACY ORGANIZATIONS

1. Guiding Principles of the Disability Policy Consortium (DPC).
2. DPC Advocacy Platform.
3. Roster of DPC.
4. "The Civic Index, A New Approach for Improving Community Life," National Civic League.
5. Overview of the Texas DD Council.
6. DD Grant Projects List.
7. Texas Health & Human Services Briefing Document.
8. Texas Restructuring Health & Human Services Programs.
9. Legislative Bulletin, 72nd Session.
10. Statement of Governor Ann Richards, 3/26/92.

**ASSIGNMENTS:** ■Visit legislators about budget crisis and discuss importance of funding community supports and services and your views on state school closure.  
■Send us a copy of your thank you notes/letters to legislators.  
■Read 20 pages of any parliamentary procedure book.

## MAY 1992 - PARLIAMENTARY PROCEDURE, COMMUNITY ORGANIZING, & GRADUATION

1. "Understanding Parliamentary Procedure", Don Sikkink
2. "Problem Solving Approaches", Community Resource Center
3. "The Organizing Process", Community Resource Center
4. Q & A, March 1992 (The ARC)
5. "The Art of Coalition Building - A Guide for Community Leaders", Cherie R. Brown

MAY 1992, cont.

6. "Self-Advocacy: The Struggle for Equality and Acceptance",  
Bernard J. Carabello, Joanne F. Siegel, & Mark Friedman
7. Self-Advocacy Bibliography (Center on Human Policy, Mott Foundation  
Self-Advocacy Project)
8. Letter from Governor Richards honoring '91-'92 Partners class.
9. Class Photograph
10. Graduation Messages

993 Partners in Policymaking National Academy

or Your Notes:

**Partners in  
Policymaking**

**DIRECTORY  
OF  
NATIONAL  
SPEAKERS**

Mr. Gerald Adams  
Human Services Institute, Inc.  
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# **Partners in Policymaking**

## ***Speaker's Confirmation Letter***

*(On Your Letterhead)*

Date

Name

Address

City

**Sample**  
**Modify as Necessary**

Dear (Speaker):

We are delighted you will be participating in our Partners in Policymaking session on (date) in (city). We have just completed our selection of this class and it looks like we will have another outstanding group. (OR - We have an outstanding group of participants who are eager to learn.) There are (number) of participants in this class: (number) self-advocates and (number) parents.

Your contract is enclosed. Please sign and return to us at your earliest convenience. Your presentation on (subject) will begin at (time) and conclude at (time) on (day), (date). I know that it will be helpful to give some history and philosophy on (subject), but I would like for the majority of time to be devoted to strategies.

This session will be at the (name of hotel, address, phone number). We will make a reservation for you and arrange to have the room direct billed to our office. You will be responsible for any incidental charges. You may make your own travel arrangements or we will be happy to make them for you. Please contact (Coordinator or fiscal agent and telephone number by certain date) regarding this matter.

We would like to have a brief bio from you to include in the Partner packets as background information. Please complete the speaker information checklist I've enclosed to assist us in making arrangements for your presentation. The Partners receive homework assignments at each session. If there is an assignment you would recommend for them (reading or other), we can include it in their (previous month's session packet). Please forward a copy of any articles, etc., prior to (the month before his/her presentation).

It would be most helpful if we could receive the information requested on or before (date required). Thank you for your assistance. We look forward to seeing you in (month).

Sincerely yours,  
(Coordinator)

# Partners in Policymaking *Speaker's Contract*

## Agreement for Organized Training Activities

This agreement is between (Partners in Policymaking or Funding Agency) and (name of speaker), the Trainer.

1. (Use this space for any legal requirements regarding the funding agency and specific rules and regulations, etc.)
2. The Trainer is an independent contractor and not an employee of (Partners in Policymaking/agency).
3. The Trainer will provide the following training services under this agreement:

Train Partners on (subject).

4. In consideration for providing the services listed in Item 3 above, (Partners in Policymaking/agency) agrees to pay the Trainer the following amount(s):
  - A. Training fee of (amount).
  - B. Travel cost including airfare, ground transportation, parking, and/or mileage at \$.x per mile.
  - C. Lodging at the negotiated meetings rate at the hotel in which the session(s) will be held. The hotel rate will be paid through direct billing. Trainer is responsible for any incidentals.
  - D. Meals up to (amount) per day. Meals served during training sessions will be paid through direct billing.

The Trainer will submit a reimbursement request form to (Partners in Policymaking/agency) showing expenses incurred and services provided and will attach receipts as indicated on the form. (Partners in Policymaking/agency) will remit the balance due to the Trainer as promptly as possible after receipt of the reimbursement request.

5. This agreement is effective from (date) and will continue in effect through (date).

For (Partners in Policymaking/agency)

For the Trainer

\_\_\_\_\_  
(Name, Title, Agency, Address, etc.)

\_\_\_\_\_  
(Name, Title, Address, etc.)

**SAMPLE - Modify as Necessary**



# Partners in Policymaking Speaker's Information Checklist

Please complete this form and return with contract and brief biography.

Speaker \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

**AUDIO-VISUAL EQUIPMENT:** Slide Projector \_\_\_\_\_ Overhead Projector \_\_\_\_\_

Flip Chart \_\_\_\_\_ Blackboard/Chalk \_\_\_\_\_ TV/VCR \_\_\_\_\_ Tape Size \_\_\_\_\_

Other \_\_\_\_\_

Recommended reading/homework assignments for Partners \_\_\_\_\_  
\_\_\_\_\_

**TRANSPORTATION INFORMATION:** Departure airport \_\_\_\_\_

Desired arrival in (city): Date \_\_\_\_\_ Aprx. Time \_\_\_\_\_

Desired departure from (city): Date \_\_\_\_\_ Aprx. Time \_\_\_\_\_

Estimated costs for: Airfare \$ \_\_\_\_\_ Ground Transportation \$ \_\_\_\_\_

**LODGING AND MEALS INFORMATION:** (Please notify us of any changes as we will make arrangements with the hotel for direct billing for lodging.)

I will require hotel lodging for (please check):

Thursday \_\_\_\_\_ Friday \_\_\_\_\_ Saturday \_\_\_\_\_

I will join the group for meals (please check):

Friday dinner \_\_\_\_\_ Saturday breakfast \_\_\_\_\_ Saturday lunch \_\_\_\_\_

Special dietary needs \_\_\_\_\_

Accessibility requirements: Wheelchair Accessible Room \_\_\_\_\_

Other \_\_\_\_\_

**SAMPLE**  
**Modify as Necessary**

# Partners in Policymaking

## *Coordinator's Checklist for Each Session*

### Things to do ahead:

- \_\_\_\_ Partner Sign-in Log
- \_\_\_\_ Facilitator/Assistant Sign-in Log
- \_\_\_\_ Room Assignment
- \_\_\_\_ Copy Roster (List of Participants)
- \_\_\_\_ Order 50 Folders
- \_\_\_\_ Order Labels (same color as folder)
- \_\_\_\_ Type Name Labels for Folders
- \_\_\_\_ Put Labels on Front of Folders
- \_\_\_\_ Participant Name Tags
- \_\_\_\_ Copy hand-outs, etc.
- \_\_\_\_ Copy Evaluations, Time/Match forms

### Packets for Speakers:

- \_\_\_\_ Reimbursement Instructions
- \_\_\_\_ Reimbursement Form
- \_\_\_\_ Agenda/Agendas
- \_\_\_\_ Partner Roster

Make sample Partner packet as model to assemble others. Retain it for historical file.

### Include in Partner packets:

- \_\_\_\_ Reimbursement Request
- \_\_\_\_ Agendas (present & future)
- \_\_\_\_ Name Tag
- \_\_\_\_ Time/Match Record
- \_\_\_\_ Evaluation
- \_\_\_\_ Roster
- \_\_\_\_ List of Speakers & Bios
- \_\_\_\_ Homework
- \_\_\_\_ Hand-outs [See "Curriculum, Parts I and II.]

### Take to training:

- \_\_\_\_ Attendance Logs (Partner/Facil.)
- \_\_\_\_ Extra Name Tags
- \_\_\_\_ Writing Tablets (3 pkgs.)
- \_\_\_\_ Pencils (2 boxes sharpened)
- \_\_\_\_ Markers (1 box, multi-colored)
- \_\_\_\_ Extra Packets (total of 50)
- \_\_\_\_ Masking Tape (1 roll)
- \_\_\_\_ Pens (2 boxes ballpoints)
- \_\_\_\_ Audiotapes & Tape Recorder
- \_\_\_\_ Wheelchair, if necessary

**SAMPLE**

**Modify As Necessary**

1993 Partners in Policymaking National Academy

**1993 Partners in Policymaking National Academy**  
**The Stouffer Hotel**  
**Austin, Texas**  
**May 20-22, 1993**

***SECTION IV - FINANCIAL***  
***Table of Contents***

This portion of the notebook contains a variety of information concerning financial matters and Partners in Policymaking. Forms for use by Partners and speakers for reimbursement are included, as is a "Time/Match Form" which is critical to continued funding for a Partners program.

"Expense Estimates: How to Calculate the Budget" will assist the Coordinator in anticipating expected costs. "Possible Funding Supports" may provide ideas for sources of financial assistance for a Partners program.

The contents of this section include:

Time/Match Form	Page 105
Instructions for Travel Reimbursement Request (Participants)	Page 106
Instructions for Travel Reimbursement Request (Speakers)	Page 107
Reimbursement Request (Participants/Speakers)	Page 108
Expense Estimates: How to Calculate the Budget	Page 109
Possible Funding Supports	Page 113

# 1993 Partners in Policymaking National Academy

For Your Notes:

# Partners in Policymaking *Time/Match Record*

This form is used to collect information about the amount of time you spend working on Partners in Policymaking. This information enables us to use time that you have devoted to this project as match for the grant that is supporting this project. Please estimate the time to the best of your ability and sign this form in the space provided.

Name \_\_\_\_\_

Date \_\_\_\_\_ Reporting on the month of \_\_\_\_\_

If you are employed, please indicate your hourly rate \$ \_\_\_\_\_

Since last completing one of these forms, I have spent approximately \_\_\_\_\_ hours on homework assignments, reading, phone calls, personal contacts, or other matters directly related to this program.

Date	Amount of Time	Type of Activity	Tool for Activity (phone, letter, etc.)

Briefly describe this month's activities related to Partners in Policymaking:

**SAMPLE**  
Modify as Necessary

# Partners in Policymaking

## *Instructions for Travel Reimbursement Request*

(Participants)

### You are entitled to reimbursement for:

- Expenses per day for meals and lodging as specified on your Training Agreement. (Meals and lodging will be billed by hotel directly to our office.)
- Transportation expenses such as airfare, mileage, ground transportation, parking, etc.
- Personal Care Assistant/Facilitator services, if applicable.
- Respite services, if applicable.
- Miscellaneous expenses as specified in your Training Agreement, such as postage, materials, and telephone charges.

### INSTRUCTIONS FOR COMPLETION:

- **Name, Address and Social Security Number:** We must have your social security number to process payment.
- **Purpose of Travel:** Indicate purpose - meetings attended, purpose of meeting, etc.
- **Meals:** Meals will be billed by hotel directly to our office. If applicable, participants may claim meals while on travel status (e.g. lunch on Friday, dinner on Saturday). Attach receipts.
- **Lodging:** Lodging will be direct billed by the hotel to our office.
- **Car Mileage:** If you travel by personal car, indicate the number of miles driven. Multiply the mileage by \$.x and enter amount. Itemize mileage, e.g. home city to and from destination and any in-town mileage.
- **Taxi or Rental Car:** If a rental car is used, receipts must be attached. A taxi should be used when more economical than a rental car. Indicate points of origin and destination.
- **Other Transportation:** If other transportation is used, such as airport shuttle, bus, or train, indicate the cost and attach receipts.
- **Commercial Airfare:** Write in the amount of airfare under miscellaneous expenses and attach receipts. First class flight is not allowed unless advance arrangements have been made (e.g., reasonable accommodation).
- **Parking Fees:** Indicate any parking expenses (at airport, etc.) under miscellaneous expenses. Receipts are/are not necessary.
- **Telephone:** Indicate total amount of telephone expenses. Telephone calls must be Partners-related and need not be made while in travel status. Receipts are/are not necessary.
- **Other Travel Expenses:** List any other travel expenses under miscellaneous expenses such as assistant fees/meals, respite fees, postage, etc. Receipts are/are not necessary.
- **Services Provided:** If applicable, give brief description of services provided.
- **Total Expenses:** Add the total amount of expenses.
- **Participant's Signature:** Sign, date, and return reimbursement request to:

(Coordinator's Name, Address, etc.)

**SAMPLE**

Modify as Necessary

1993 Partners in Policymaking National Academy

# Partners in Policymaking

## *Instructions for Travel Reimbursement Request*

(Speakers)

### You are entitled to reimbursement for:

- Expenses per day for meals and lodging as specified in your contract. (Meals and lodging will be billed by hotel directly to our office.)
- Transportation expenses such as airfare, mileage, ground transportation, parking, etc.
- Personal Care Assistant/Facilitator services, if applicable.

### INSTRUCTIONS FOR COMPLETION:

- **Name, Address and Social Security Number:** We must have your social security number to process payment.
- **Purpose of Travel:** Indicate purpose - meetings attended, purpose of meeting, etc.
- **Meals:** Meals will be billed by hotel directly to our office. Other meals will be reimbursed per your contract. Receipts are/are not necessary.
- **Lodging:** Lodging will be direct billed by the hotel to our office.
- **Car Mileage:** If you travel by personal car, indicate the number of miles driven. Multiply the mileage by \$.x and enter amount. Itemize mileage, e.g. home city to and from destination and any in-town mileage.
- **Taxi or Rental Car:** If a rental car is used, receipts must be attached. A taxi should be used when more economical than a rental car. Indicate points of origin and destination.
- **Other Transportation:** If other transportation is used, such as airport shuttle, bus, or train, indicate the cost and attach receipts.
- **Commercial Airfare:** Write in the amount of airfare under miscellaneous expenses and attach receipts. First class flight is not allowed unless advance arrangements have been made (e.g., reasonable accommodation).
- **Parking Fees:** Indicate any parking expenses (at airport, etc.) under miscellaneous expenses. Receipts are/are not necessary.
- **Telephone:** Indicate total amount of telephone expenses. Telephone calls must be Partners-related and need not be made while in travel status. Receipts are/are not necessary.
- **Other Travel Expenses:** List any other travel expenses under miscellaneous expenses such as assistant fees/meals, respite fees, postage, etc. Receipts are/are not necessary.
- **Services Provided:** Give brief description of services provided.
- **Total Expenses:** Add the total amount of expenses.
- **Speaker's Signature:** Sign, date, and return reimbursement request to:

(Coordinator's Name, Address, etc.)

**SAMPLE**  
**Modify as Necessary**

# Partners in Policymaking

## Reimbursement Request (Participants/Speakers)

Name \_\_\_\_\_ SSN \_\_\_\_\_  
 Address \_\_\_\_\_  
 City, Zip \_\_\_\_\_  
 Purpose of Travel \_\_\_\_\_

### MEALS/LODGING (attach receipts)

						TOTALS
Date(s)						
Breakfast						
Lunch						
Dinner						
Lodging						

### CAR MILEAGE (include home city to and from destination and in-town mileage)

Date \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_ Miles \_\_\_\_\_  
 Date \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_ Miles \_\_\_\_\_  
 Date \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_ Miles \_\_\_\_\_  
 Date \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_ Miles \_\_\_\_\_  
 Total Miles Traveled \_\_\_\_\_ x \$.25/mile = Total Amount \$ \_\_\_\_\_

### TAXI, RENTAL CAR, OTHER TRANSPORTATION, ETC. (attach receipts)

Date \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_ \$ \_\_\_\_\_  
 Date \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_ \$ \_\_\_\_\_

### MISCELLANEOUS EXPENSES (attach receipts)

(Include airfare, parking fees, speaker fees, attendant fees/meals, respite fees, etc.)

Date	Description	\$
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### STATEMENT OF ACCOUNT

Date	Description of Services Provided (if applicable)	\$
_____	_____	_____
_____	_____	_____

**TOTAL EXPENSES: I certify this information is true and correct.** \$ \_\_\_\_\_

\_\_\_\_\_  
 Participant's or Speaker's Signature Date

I verify that the total amount due to participant/speaker for the month of \_\_\_\_\_  
 is \$ \_\_\_\_\_.

Partners Coordinator

**SAMPLE - Modify as Necessary**



# PARTNERS IN POLICYMAKING

## EXPENSE ESTIMATES

### *How to Calculate the Budget*

#### 1. PERSONNEL - SALARIES AND BENEFITS

Do you plan to contract/grant for staff coordination or provide staff coordination through your program staff? Both have clear advantages worth consideration. In most instances, coordinating Partners In Policymaking activities directly through program staff allows you to better guide the overall direction of Partners training activities in a manner that assures consistency with your values and vision. Not all grantees/contractors will have an organizational mission and values identical to yours.

Many states, however, find it difficult to provide timely reimbursements for participants through their state fiscal system, and advances for travel are usually not possible within state agencies. Since Partners are frequently in low income situations, it is critical to develop a mechanism to prompt reimbursement for out-of-pocket expenses. State systems which typically have a 30-45 day reimbursement process are severely limiting.

We encourage consideration of a combination of coordination through staff plus a grant/contract entity to provide reimbursement to Partners, hotels, presenters, etc. On this basis, you should expect .5 - .75 FTE for a Project Coordinator (not evenly spread throughout the year) plus about .75 FTE administrative/secretarial as minimum expectations. The range for this support will vary based on salary schedules and benefit package, but could be \$35,000 - \$55,000 (including benefits) annually.

A grantee/contractor will need an additional 25-40% FTE to process reimbursements, purchase and mail airplane tickets in advance, and perform other fiscal and administrative support functions. This function should be about 8 - 10% of total reimbursements handled, or a possible range of \$8,000 - \$15,000 annually.

#### 2. PARTICIPANT EXPENSES

##### **Transportation**

**Airfare/Mileage:** Calculate average expense in your state for airfare or mileage reimbursement (@ \$0.275 per mile) to your Partners site from various locations in state. Estimated costs will vary; some Partners traveling shorter distances or living locally will drive. Remember to include the travel expenses for attendants needed to travel with Partners. Transportation expenses in medium - larger states can easily average \$4500 - \$5000 per session. The yearly range could be \$15,000 - \$45,000.

## 2. PARTICIPANT EXPENSES - Continued

**Note:** When using a grantee for fiscal functions, consider having the grantee purchase airline tickets at reduced fares in advance and mailing to Partners. 21 day advance tickets are currently much cheaper than unrestricted, 7 day advance tickets. By using one entity for all tickets, you may also be successful negotiating with airlines to reissue tickets for a future month when you have cancellations due to illness and other emergencies! It's worth asking.

**Ground Transportation:** Does hotel provide a shuttle van for transportation to and from airport? Is it lift-equipped? It may be necessary to include taxi fare if shuttles are not available. If accessible public transit is not available for some Partners needing that type of service, you may need to contract for a lift-equipped van with driver. Estimated cost is \$30 per hour, usually with a 2-3 hour minimum, or \$180 per weekend. Expenses can range from \$0 - \$1,440 yearly.

### Meals

Partners weekends include 3 meals - dinner on Friday and breakfast and lunch on Saturday. Calculate expenses for all Partners and attendants. Costs will range from \$30 - \$45 per person per weekend depending on prevailing rates and your food choices. (Remember that we strongly encourage having all meals as a group to foster social relationships. Include in your calculations for meals all presenters, staff, and occasionally a few Council members who may "visit" some sessions. Total expenses could range from \$10,000 - \$15,000 annually.

### Lodging

Estimate costs of guest rooms for Partners and attendants. Pairing Partners 2 per room for lodging enhances building positive relationships. But remember that some Partners may require an attendant in their rooms. Look closely at the possibility of Partners from the local area also staying at hotel. They otherwise miss part of the experience, and it is frequently a necessary accommodation for some individuals given attendant and transportation situations. We again encourage a master bill for all guest rooms. This also gives you a better ability to negotiate rates. The range will vary largely depending on prevailing rates, but can be \$7,500 - \$12,000 annually.

### Attendant and Respite Services

Calculate the cost of attendant services for those Partners needing such assistance for participation. (Remember that some Partners may need 2 attendants, some may need assistance only at night and morning. Individual needs vary.) Many parents will need respite care for their children while they attend. Other participants may need sign language interpreters, a "communication facilitator", or braille, large print, or voice cassette materials for full participation. The range will vary widely based on needs of your Partners participants, but could range from \$3,000 - \$10,000 per year.

## 2. PARTICIPANT EXPENSES - Continued

### Books and Materials

A variety of books and materials will need to be purchased as training materials for various sessions. Estimates are \$5,000 - \$9,000 per year.

## 3. MEETING AND FACILITY COSTS

### Meeting Room Rentals

If you negotiate with hotels for guests rooms and meal functions for the group, you will typically receive free or discounted meeting rooms. We encourage eating dinner and lunch in a different room than the room used for training sessions. It saves time and inconvenience. Costs may range from \$0 - \$1,200 per year.

### Audio Visual Expenses

Most weekends, presenters will need flip charts, video equipment and an overhead projector. Slide projectors may also be needed for some presentations. You will likely need microphones for presenters every session. Wireless microphones are expensive, but worth the extra cost to enable presenters to mingle more personally with participants. Expect \$3,200 - \$4,800 per year for audio visual expenses.

### Presenter Expenses

This includes honoraria, travel expenses, hotel and meal accommodations, accessible transportation for some individuals, and copying of materials. Honoraria vary somewhat from \$0 - \$500 for in-state presenters to \$500 - \$750 for national presenters. A few nationally known presenters ask more.

Presenters are generally agreeable to staying over Saturday night to save on airfare. We also highly encourage requiring presenters to provide copies of all materials in advance for you to copy and prepare packets, particularly if alternate formats are required by any of your participants. Expenses can range from \$12,000 - \$20,000 (based on 16 out-of-state speakers) per year.

### Staff Travel

This item includes in-state costs for recruitment, hosting meetings, travel for presentations about Partners in Policymaking at various meetings and conferences, etc. The size of the state obviously affects this item greatly, but the range can be \$1,000 - \$5,000 yearly.

<b>4. OPERATING EXPENSES</b>
<b>Rent/Space</b>  Most programs report donated office space or consultants using their homes for offices. This may also be a match contribution. Estimated range could be \$0 - \$1,500 per year.
<b>Communications</b>  Telephone, fax, postage, mailings, etc., can range from \$250 - \$400 per month, or \$3,000 - \$4,800 annually.
<b>Printing</b>  Photocopying and printing costs of training materials, mailings, brochures, application materials, action alerts to Partners, and materials for presentations about Partners at other state conferences can range from \$1,200 - \$4,800 per year for these expenses.
<b>Office Supplies</b>  Paper, pens, computer disks, etc., attributable to session activities range from \$1,200 - \$4,000 per year.

<b>5. INDEPENDENT EVALUATION</b>
As discussed elsewhere, an independent evaluation of your Partners program is strongly recommended. Projected expenses for this are approximately \$2500 per year initially, more in later years as the number of graduates to track increases.

<b>6. NEWSLETTER</b>
We suggest consideration of a "newsletter" mechanism for Partners to share with one another. This item could be \$500 per year if done as a volunteer effort by Partners, or considerably more if done by staff or a grant/contract.

<b>7. MATCH CONTRIBUTIONS</b>
Match is generated by the noncash hourly time contributions of Partners participants both for weekend sessions and direct time involved in homework assignments prior to each session as well as their required intern experiences. Time can be "valued" in various ways with an estimated range of \$10 - \$25 per hour, or \$50 - \$150 per day.

# **Partners in Policymaking**

## ***Possible Funding Supports***

Following are organizations that could be utilized as financial supports to fund Partners programs. These ideas were generated by participants at the 1990 National Academy. Additional funding sources can be found in the Summary of the 1992 National Academy, on page 180, Section VII of this notebook.

Possible funding sources could include:

- Administration on Developmental Disabilities
- Banks
- Civic Groups
- Colleges and Universities
- Corporations (McDonalds, IBM, etc.)
- Developmental Disabilities Councils
- Disability Organizations (The Arc, UCP, etc.)
- Federal Funds/Grants
- Foundations (Corporate, State, and National)
- Industry Councils
- Legal Rights Organizations
- State Demonstration Grants
- State Departments of Education
- State Departments of Human Services
- Parent Training and Information Centers
- Private Resources and Donors
- Protection and Advocacy Agencies
- University Affiliated Programs

# 1993 Partners in Policymaking National Academy

For Your Notes:

**1993 Partners in Policymaking National Academy**  
**The Stouffer Hotel**  
**Austin, Texas**  
**May 20-22, 1993**

**SECTION V - EVALUATIONS**

**Table of Contents**

(ND on documents means "No date.")

This portion of the notebook contains a variety of forms for evaluations/surveys. It begins with the "Training Session Evaluation," which Partners use to rate each session for its effectiveness. Other forms help graduates rate themselves and the program after graduation. An "Initial Survey," which participants complete very early in the program is located in Section II - Recruitment/Selection.

This information will eventually go into an independent evaluation of the program. The summary of the Minnesota Partners "Quantitative and Qualitative Outcomes - The First Five Years" is an example of an independent evaluation. Evaluations are the ammunition a Coordinator needs when seeking continued and/or increased funding for the Partners program. If you're turning out a good product (Partners as successful change agents), funders will continue to provide the financial support you need.

The contents of this section include:

Training Session Evaluation	Page 117
Six Month Follow-Up Evaluation	Page 119
Long Term Follow-Up Survey	Page 122
Participant Comments 1991 (TX)	Page 125
Energy, Power, and Outreach of Partners (AL)	Page 126
Accomplishments and Efforts of Partners (AL)	Page 127
Summary of Quantitative and Qualitative Outcomes: The First Five Years (MN)	Page 129

# 1993 Partners in Policymaking National Academy

For Your Notes:



# Partners in Policymaking Training Session Evaluation

Session Title \_\_\_\_\_

Date \_\_\_\_\_

Consumer \_\_\_\_\_

Parent \_\_\_\_\_

Please circle your response to each statement.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Not Applicable
1. The speaker(s) presented the information clearly.	5	4	3	2	1	N/A
2. I received new information.	5	4	3	2	1	N/A
3. The information was relevant to my needs and will improve my advocacy abilities.	5	4	3	2	1	N/A
4. The speaker(s) answered questions satisfactorily.	5	4	3	2	1	N/A
5. I felt the speaker(s) were sensitive to Partners' individual situations.	5	4	3	2	1	N/A
6. The handouts/advance materials were valuable.	5	4	3	2	1	N/A
7. The audio/visual aids, if any, helped clarify the information presented.	5	4	3	2	1	N/A
8. My general reaction to the program was positive.	5	4	3	2	1	N/A
9. The program met my expectations.	5	4	3	2	1	N/A

The thing I liked most about this session was \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TRAINING SESSION EVALUATION**  
**(continued)**

The session would have been better if \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

In what ways will the knowledge and skills gained this weekend be useful to you? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other comments \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Thank you for completing this evaluation.

**SAMPLE**  
**Modify as Necessary**

# Partners in Policymaking

## *Six Month Follow-up Evaluation*

I.D. Number \_\_\_\_\_

**This survey is an effort to measure your advocacy activities during the six months since your graduation from Partners in Policymaking. Please answer the questions to the best of your ability, providing estimates when necessary. Participation is voluntary.**

1. Which year did you participate in the Partners in Policymaking program? \_\_\_\_\_

2. Overall, how would you now evaluate the Partners program?

- Excellent
- Very Good
- Good
- Fair
- Poor

3. Specifically, how would you evaluate the Partners program in teaching you to become a better advocate for yourself or a family member with a disability?

- Excellent
- Very Good
- Good
- Fair
- Poor

4. Please evaluate your current ability to secure appropriate services for yourself or a family member with a disability.

- Excellent
- Very Good
- Good
- Fair
- Poor

5. Overall, how would you rate your current advocacy skills?

- Excellent
- Very Good
- Good
- Fair
- Poor

SIX MONTH FOLLOW-UP EVALUATION  
 continued)

**This part of the survey is an effort to measure your advocacy activities since your graduation from Partners in Policymaking. Please answer the questions to the best of your ability, providing estimates when necessary.**

1. Since graduation, have you been in contact with national, state, or local public officials regarding your needs or the needs of a family member with a disability? **(Check all that apply.)**

- Yes, National      Estimated number \_\_\_\_\_
- Yes, State      Estimated number \_\_\_\_\_
- Yes, Local      Estimated number \_\_\_\_\_

2. If you answered yes to #1, please indicate the type of contacts (letters, phone calls, office visits) with public officials you've made since graduation, and estimate the frequency of each. **(Check all that apply.)**

- Letters      Estimated number \_\_\_\_\_
- Phone Calls      Estimated number \_\_\_\_\_
- Office Visits      Estimated number \_\_\_\_\_

3. What other opportunities have you had to advocate for yourself or other persons with disabilities or to educate the public regarding the rights or needs of persons with disabilities? **(Check all that apply.) Also, please evaluate your current competency for each.**

	Excellent	Good	Fair	Poor
<input type="checkbox"/> Testified at a public hearing Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> Presentation to parent groups Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> Presentation at a conference Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> Service on a committee Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> TV or radio appearances Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> Published articles/letters to editor Estimated number _____	_____	_____	_____	_____
<input type="checkbox"/> Other: Comments _____				

\_\_\_\_\_  
 \_\_\_\_\_



# Partners in Policymaking

## *Long Term Follow-up Survey*

I.D. Number \_\_\_\_\_

**The purpose of this survey is to collect follow-up information from graduates of the Partners in Policymaking program. Please answer the questions to the best of your ability. Participation is voluntary.**

1. Please evaluate your ability to secure appropriate services for yourself or a family member with a disability.

- Excellent
- Good
- Fair
- Poor

2. Do the skills you learned during the Partners program continue to be helpful in securing appropriate services today?

- Yes, most of the time
- Yes, some of the time
- Seldom
- No, not at all

3. Overall, how would you rate your current advocacy skills?

- Excellent
- Good
- Fair
- Poor

4. What significant changes (in housing, education, employment, friendships, other) have occurred in your life or in the life of a family member with a disability which you attribute to your experience with the Partners program?

Housing:

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**Continuation of Question 4:**

**Education:**

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**Employment:**

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**Friendships:**

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**Other:**

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**5. What skills learned during the Partners program do you continue to use today?**

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**6. Looking back at your experience with the Partners program, what would you now recommend to improve the program?**

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**LONG TERM FOLLOW-UP SURVEY**  
(continued)

7. Looking back at your experience with Partners, what three speakers or presentations continue to stand out as the most beneficial or influential?

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

8. Please describe your current interactions, if any, with fellow Partners graduates, advocacy organizations, or other individuals involved in advocacy activities.

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9. Please add any other comments you would like to make.

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Thank you for your assistance in this survey. Please return this evaluation in the self-addressed envelope as soon as possible.

**SAMPLE**  
**Modify as Necessary**



# PARTNERS IN POLICYMAKING

1991

- "I have been inspired to dream again and not let others intrude upon my dreams, and to encourage others to dream."
- "This has been the most important thing in my life besides my family. It exceeded my expectations by far. I learned more than I ever dreamed of--I have resources to keep learning."
- "The speakers validated feelings I had inside, about how persons with disabilities should be treated. And then they taught me how to act on those feelings to secure the rights and responsibilities for persons with disabilities."
- "This is an incredibly worthwhile and valuable program... Our hearts are so very full--it is difficult to express how this program has literally changed my life...I am so ready to work hard to change things."
- "I am overwhelmed at the opportunities that this program offers. It can only make for a more responsive government that truly represents the needs and desires of its peoples."
- "I feel empowered now and want to get the job done."
- "I am not afraid to ask for what not only my child needs but what other children need."
- "PIP allowed me to dream again--I feel alive again. I was oppressed by my son's disability--I feel free to live again. I'll never be the same."
- "I wasn't expecting the tremendous network from being in this program."
- "I am a changed person...I will, in turn, work hard to change others."
- "Partners has taught me so many different and wonderful things. But I think the most important thing I've learned is how one person can make a difference--by both individual effort and as a leader of others."
- "It has changed all areas of my life. I can't express that enough."
- "Partners to me now is like I have a new family that I can always count on. Thanks for the opportunity to be part of this."
- "I want you to know it has changed my life; and probably in ways I don't even know yet! It has fine tuned my advocacy skills and my skills in dealing with people in general. I find myself using the principles I have learned in Partners more and more. I have matured personally."
- "The training has given me confidence and educated me regarding best practices. I look forward to learning more and sharing with others. I thank you and consider myself privileged to have been selected."

# THE ENERGY, POWER AND OUTREACH OF P.I.P.A. CLASS OF 1990 - 1991

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1. *Over 64 news articles generated across the state.*
2. *Over 58 television and radio programs.*
3. *Over 19 presentations at conferences.*
4. *9 University level speaking engagements.*
5. *Over 32 appointments to committees, commissions or task forces.*
6. *Over 450 letters generated to policymakers.*
7. *Over 11 testimonies at county, state and federal hearings.*
8. *Over 235 personal visits to legislators.*
9. *Over 5225 phone calls generated to legislators.*
10. *Children in integrated environments.*
11. *Individuals with disabilities and other participants have and are:*
  - Returning to school*
  - Changing jobs*
  - Becoming competitively employed*
  - Interested in running for public office*

# ACCOMPLISHMENTS AND EFFORTS OF P.I.P.A. PARTICIPANTS: CLASS OF 1990 - 1991

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.....  
\* Alabama Partners \*  
.....

1. *Initiated and implemented 3 accessibility studies yielding dramatic changes in accessibility to public buildings.*
2. *Developed 1 local coordinating council as related to P.L.99-457 and many participating in the organization and implementation of these regional councils. 6 individuals are holding office within these councils.*
3. *Wrote 2 grants to meet specific needs within local areas.*
4. *Created 5 support and service organizations to offer support and information to families of persons with disabilities.*
5. *Involved in creating integration opportunities within Alabama's day care system.*
6. *Involved in development of respite care.*
7. *Organized and acted as chairperson of a statewide workshop for parents and professionals.*
8. *Several individuals serving on speakers bureau for state organizations.*
9. *Developed a statewide coalition for persons with disabilities within Alabama.*
10. *Created and increased employment opportunities for persons with disabilities*
11. *Unlimited personal contacts sharing information and offering support to others.*
12. *Increased self-esteem of persons with disabilities and parents of children with disabilities.*
13. *Efforts to inform medical professionals regarding the needs of individuals with disabilities and their families.*
14. *A tremendous interest and effort in developing family support services in Alabama.*

6. *Developing and disseminating a newsletter to partners participants including activities and accomplishments of individuals and their families in their own local communities , efforts conducted at state and federal levels, and sharing resources and information.*
6. *Hours and hours of work in establishing legislation mandating services for three and four year olds, a bill creating a catastrophic trust fund and a bill to generate money to sustain this fund.*
7. *Partners participants:*
  - *Have a vision for the future*
  - *Will seek change.*
  - *Are motivated.*
  - *Are informed.*
  - *Will speak up.*



Michael (7 years old) and Jennifer (5 years old) Gothard

Tammy Gothard, Jackson County - "PIPA has proved to be what it stands for. We are not just parent/friends, we are partners. Strength comes to bond, and energize our capabilities of which we had but didn't know what to do with."

Jennifer, Tammy's four year old daughter, has Spina Bifida with hydrocephalus and paralysis from the waist down. My children are my "lifeline", they keep me going when I feel I can go no longer. I want both my children to have equal opportunities in life, we've just had to fight a little harder for Jennifer to achieve hers, and will have other battles to conquer in the future. I hope to better the quality of life for all people with disabilities, possible making an easier path for someone to follow, being a voice for a child or adult whose parents or guardians don't fight for their rights. Programs, laws, groups, etc. need to be more publicized to reach people, most of parents receive information ear-to-ear."

# Partners in Policymaking

A Summary of

**“Quantitative & Qualitative Outcomes  
The First Five Years”**

**Minnesota Partners in Policymaking**

**Original Evaluation Submitted by  
Thomas J. Zirpoli, Ph.D.  
University of St. Thomas  
(Revised 1/14/92)**

## Participant Characteristics: Years One Through Five

(Percentages shown represent the mean over five years.)

**Female** 79%  
**Male** 21%

**Mean Age** 35.6

**Parent of a child with a disability** 78%  
**Consumer with a disability** 22%

### Place of residence

Urban 20%  
Suburban 46%  
Rural 34%

### Level of Education

Less than high school 01%  
High school graduate 26%  
Two years college 27%  
Four years college 20%  
Graduate work 14%  
Master's Degree 08%  
Doctoral Degree 04%

### Income

< 12,000 13%  
12-19,999 13%  
20-29,999 25%  
30-39,999 22%  
49-49,999 12%  
> 50,000 15%

## Survey Return Rate

A survey was mailed to all graduates of the Partners in Policymaking Program, years one through five. A total of 163 surveys were mailed. After an initial mailing and two follow-up mailings, 130 surveys (79.7%) were returned for analysis. The information collected from the surveys was divided quantitative and qualitative data. The data are outlined within this report.

## Quantitative Outcomes

**Overall, how would you evaluate the Partners in Policymaking program?**

Excellent	67%
Very Good	26%
Good	04%
Fair	02%
Poor	01%

**Specifically, how would you now evaluate the Partners project in teaching you to become a better advocate?**

Excellent	57%
Very Good	31%
Good	08%
Fair	02%
Poor	02%

**Have you been able to secure better services as a result of your participation in the Partners program?**

Definitely Yes	62%
Yes, Somewhat	31%
Probably Not	04%
Definitely No	01%

**Since graduation, have you been in contact with national, state, or local public officials regarding your needs or the needs of a family member with a disability?**

National	62%
State	81%
Local	84%

**What kind of contact with public officials have you had since graduation?**

Letter	70%
Phone Call	79%
Office Visit	59%

Number of Letters: 1 - 5	37%
6 - 10	18%
11 - 15	05%
16 - 20	02%
21+	08%

**SUMMARY: FIVE YEAR EVALUATION/MINNESOTA  
(continued)**

**Number of Phone Calls:**

1 - 5	39%
6 - 10	17%
11 - 15	07%
16 - 20	04%
21+	10%

**Number of Office Visits:**

1 - 5	37%
6 - 10	11%
11 - 15	02%
16 - 20	04%
21+	04%

**What other opportunities have you had to advocate for yourself or other persons with disabilities or to educate the public regarding the rights or needs of persons with disabilities?**

Testified at a Public Hearing	33%
Presentation to Parent Group	66%
Presentation at a Conference	43%
Service on a Committee or Commission	73%
TV or Radio Appearance	22%
Published Articles or Letters in Newspapers or Professional Journals	40%

**Testified at a Public Hearing**

<b>Number of times:</b>		
1 - 5	32%	
6 - 10	02%	
11 - 15	01%	
16 - 20	01%	
21+	01%	

**Presented to a Parent Group**

<b>Number of times:</b>		
1 - 5	41%	
6 - 10	10%	
11 - 15	04%	
16 - 20	03%	
21+	04%	

**Presented at a Conference**

<b>Number of times:</b>		
1 - 5	32%	
6 - 10	02%	
11 - 15	01%	
16 - 20	01%	
21+	01%	



**SUMMARY: FIVE YEAR EVALUATION/MINNESOTA  
(continued)**

**Served on a Committee or Commission**

Number of times:	1 - 5	45%
	6 - 10	09%
	11 - 15	08%
	16 - 20	01%
	21+	03%

**Made a TV or Radio Appearance**

Number of times:	1 - 5	20%
	6 - 10	01%
	11 - 15	01%
	16 - 20	00%
	21+	00%

**Published an Article or Letter in a Newspaper or Professional Journal**

Number of times:	1 - 5	33%
	6 - 10	03%
	11 - 15	02%
	16 - 20	01%
	21+	00%

## **Qualitative Data**

### **From Year 1 Graduates**

It's difficult to tell you how much Partners helped my family. I have two children who have multiple disabilities. I have felt overwhelmed with their needs. I didn't even know where to begin to help them. I was struck especially with a fear of a very lonely life for them. Partners gave me something to focus on in order to help them.. I developed new ways of thinking about jobs, friendships, and recreation for Michael and Martha. I learned who to go to for help and how to approach those people. I learned to stay involved with other people who have disabilities and the organizations which serve them. Thank you for your help.

Partners helped me make some wonderful friendships.

Besides continuing and expanding my activities on committees and nonprofit boards, I've had the incredible opportunity to develop a clinic at the University hospital to include community interventions for persons with autism. I am able to use my knowledge from Partners to assist many families to access services and teach them how to advocate for themselves. Thanks to Partners, I am a great resource for many others.

**SUMMARY: FIVE YEAR EVALUATION/MINNESOTA  
(continued)**

The network of parents across Minnesota is invaluable.

Keep it going! Get the old grads back together to brainstorm on the next steps and to network.

I truly enjoyed every Partners meeting. They were all very informative, educational, well planned with excellent speakers. I have enjoyed watching the Partners group grow and become better every year -- due to Colleen Wieck's excellent expertise and hard work.

I feel very honored to have been chosen to be a part of Partners. Also, I have been chosen to serve on the Governor's Planning Council and the U.C.P. Boards which Colleen recommended me for. Colleen and her staff members are super people to know and work with.

There is a heavy focus on services for people with mental retardation and not near as much on services for other disabilities.

Partners was an excellent experience -- I am looking forward to Partners advanced leadership. Partners prepared me to go on to complete a Master's degree in Public Administration with a 3.7 GPA. I am now looking forward to a full time job.

It was timely, helpful and essential to get a grasp of the "system."

Every parent and self-advocate should have this opportunity. I can't say enough about it. It has changed our lives.

The program has provided the tools and methods to facilitate change and the insight to know where and when change is necessary. We are enjoying the efforts of my advocacy and other advocates.

It was a great experience and I learned to be more assertive in what I need for my family.

**FROM YEAR 2 GRADUATES**

Partners was an excellent experience. I think it prepared me well for influencing public policy. The time commitments of my family and job keep me from participating more fully. I would like to do more and often feel bad because I have been trained so well and I am unable to become more involved.

My present impact is mostly local. I have young children and limited time to be active. My child with disabilities is only 7 so I will be involved with this for many years to come. I expect my advocacy activities to increase through time.

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**SUMMARY: FIVE YEAR EVALUATION/MINNESOTA  
(continued)**

**Partners was one of the greatest experiences of my life. Not only am I better educated but I have much greater self-esteem and self-confidence. I wish every person with a disability could experience the natural high that I did.**

**I wish that there would be another opportunity to attend more "partners" meetings to stay abreast of current laws, movements, and ideas. I have been to other trainings and none of them compare to Partners in excellent content.**

**Partners project gave a great background and confidence needed to make "waves" and carry on for family and others. Would like to see another workshop for follow-up and updates of materials, etc.**

**The Partners project has been the most worthwhile thing I have ever taken part in. I stay in contact with some Partners from my year and other years. I feel I left the project well informed and trained. I felt and still do feel comfortable calling persons to seek help and advice for anything or any reason.**

**FROM YEAR 3 GRADUATES**

**The trip to Washington, DC to meet with the national legislators from our state was invaluable, because many policies are mandates from the federal level.**

**The best investment for my son's future was my investment in taking the Partner's program. The time, energy, and commitment to learn everything they taught is reaping great rewards not only for my son's self-dignity, but for mine as well. We both are experiencing inclusion for the first time. I would never have had the know how or perseverance without my training in Partners.**

**There was something very, very special about our time together in Partners. All the graduates I've talked to miss the group. Was it the camaraderie of all learning and working together for a common cause? A common background? A common knowledge base?**

**A life changing experience - knowing what I know through Partners has made all the difference in getting what we need. Also, the resources and people resources we learned about/received have been invaluable.**

**As a result of attending Partners, I decided to change careers to work in the field of disabilities and I have done that.**

**FROM YEAR 4 GRADUATES**

**Appreciated the leadership skills, strategies, and opportunity to meet people.**

**SUMMARY: FIVE YEAR EVALUATION/MINNESOTA  
(continued)**

Partners was the best advocate training anyone should possibly get. My children wouldn't be getting the services they needed if I hadn't had the help from Partners. I did notice that the year I was involved in Partners most of the participants had already had involvement with gov. or committees. I was new at the whole thing and was just starting to see how to contact gov. officials, etc. I wish more "new" parents could become involved with the program and get the info I did out of it.

This program has given me that necessary skill to acquire services I need to live independently.

Partners gave me the background, confidence, and networking to strengthen what I was already doing. It helped me to see the big picture, to see the goal, the dream of inclusion and capability instead of segregation and dependence. Partners is probably the single most influential program I've attended in terms of advocacy. I think all parents should have the opportunity.

Super program! Have heard several educators say they wish there was a version of this for them to attend. The networking system established is a great source of help and encouragement.

I only reacted to "systems" without advocating. Now I feel I am "productive" and a day does not go by that I do not in some way advocate for my child or others.

**FROM YEAR 5 GRADUATES**

I can't count for each time I've been able to educate another person about how much better the quality of life should be for everyone, and how we can make the change.

I would like to see it happen again. There wasn't enough homework.

This was a terrific program. It presents pathways for independence, self-determination and advocacy, but does not limit itself to one method or one point of view. It enables but is not prescriptive. I feel enabled to deal with a variety of personal situations and to assist others as well.

Partners is effective empowerment. I'm receiving recognitions as a parent/professional for the first time, and getting programming and services for my daughter, the result of state-of-the-art info at Partners. Partners is leadership training with polish. To be effective, one needs understanding of the system and information to stand on. We were given that. I expect to be challenged because of Partners training and look forward to using new skills.

I am currently establishing my own company which provides many different services to people with disabilities. I have graduated as a Developmental Disability Tech and

**SUMMARY: FIVE YEAR EVALUATION/MINNESOTA**  
(continued)

now have many advocacy skills thanks to Partners in Policymaking.

Can you break a twig? Can you tear a telephone book page? Easily. But, can you break a bundle of twigs or can you tear a telephone book in one stroke? No. Our strength is in numbers. Today's buzz word is networking. The most valuable part of our program, to me, was the unity our group built even though our disabilities or our childrens' or husbands' or wives' or friends' disabilities all varied. Partners was a rich medium in which to learn. I appreciated the "experts" that were brought in to help us. I feel honored to have participated in Partners.

# 1993 Partners in Policymaking National Academy

For Your Notes:

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**1993 Partners in Policymaking National Academy**  
**The Stouffer Hotel**  
**Austin, Texas**  
**May 20-22, 1993**

**SECTION VI - POST-GRADUATE**  
**Table of Contents**  
(ND on documents means "No date.")

This portion of the notebook contains a variety of information on post-graduate issues. A sample diploma and press releases for graduates are included.

Support for graduates is critical to maintain the momentum and the integrity of the Partners in Policymaking program. The agendas from post-graduate training in Texas and summer leadership trainings in Minnesota are included.

The contents of this section include:

Diploma (TX)	Page 141
Graduation News Releases (TX)	Page 142
Partners II Post-Graduate Training (TX)	Page 146
Negotiation Skills Workshop (MN)	Page 147
1992 Summer Institute Leadership Training (MN)	Page 149
1993 Summer Institute Leadership Training (MN)	Page 158

# 1993 Partners in Policymaking National Academy

For Your Notes:







**Texas Planning Council  
for Developmental  
Disabilities**



4900 North Lamar Boulevard, Austin, Texas 78751-2316  
(512) 483-4080 TDD (512) 483-4099 FAX (512) 483-4097  
Roger A. Webb, Executive Director

Lee Veenker, Chairman  
Shenikwa D. Cox, Vice Chairman

**MEMORANDUM**

**TO: Partners In Policymaking Graduates**

**FROM: Lucy Walker  
Public Information Specialist**

**SUBJECT: Partners in Policymaking -- News Release Instructions**

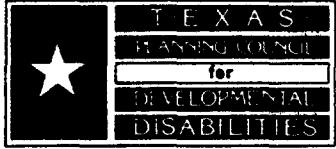
**DATE: April 27, 1992**

We have enclosed a news release that you can use to publicize your graduation from Partners and to obtain media coverage for disability issues. This is primarily for Partners outside of the Austin area, since local media are being invited to the graduation reception.

We encourage you to write a personalized cover letter and send (or take) it with the enclosed news release to your local media. If you want to mail the press release and follow it up with a phone call, you can indicate in your letter that you will call them if you have not heard from them in about a week to see if they have any questions or if they would like to meet with you. Please call the media and ask for the name of the person who covers disability issues (or human services and health-related issues) so you can address your letter to that individual. This increases the possibility of it being used and allows you to begin to develop a relationship with the individual for future coverage. Please be sure to include your address and phone number in the letter and invite the individual to call you if they want more information or if they want to meet and talk with you.

Things you might want to mention briefly in your letter are: Some basic information about yourself (whether you have a disability or are a parent); information about your child (if you are a parent); what you have gained/learned from being a Partner; your personal project/major Partners' assignment; or something about a local disability issue(s) that you would like to see the media address. Please keep a copy of the cover letter and news release so you can refer to them if a reporter calls you.

Your cover letter will 1) allow the media to localize the news release, 2) introduce you to the media staff as a local expert on disability issues, 3) act as an enticement to encourage a reporter to contact you and meet with you, and 4) increase the media's awareness of disability issues.



## Texas Planning Council for Developmental Disabilities



4900 North Lamar Boulevard, Austin, Texas 78751-2399  
(512) 483-4080 TDD (512) 483-4099 FAX (512) 483-4097  
Roger A. Webb, Executive Director

Lee Veenker, Chairman  
Shenikwa D. Cox, Vice Chairman

### Media Alert

April 1992

Contacts: Lucy Walker and Jopie Smith  
(512) 483-4092 483-4089

### 30 Texans Graduate From Partners in Policymaking Program

**Event:** Thirty Texans who have disabilities or who are parents of children with developmental disabilities will be honored for completing an 8-month leadership program, Partners in Policymaking. Graduates will share their experiences and how this training program has affected their lives. Two of the graduates are from Austin: Brenda Coleman-Beattie who resides at 1405 Lost Creek Blvd. in southwest Austin and Felipe Loera who resides at 2604 South 2nd.

**When:** Saturday, May 2, 1992  
12:30 p.m. - Reception begins  
1 p.m. - Formal presentations and remarks by Partners  
2:30 p.m. - Reception ends

**Where:** Sheraton Austin Hotel, IH 35 and 6th Street  
Atrium, 10th Floor

**Background:** Sponsored by the Texas Planning Council for Developmental Disabilities, Partners in Policymaking is an innovative leadership training program that analyzes developmental disability issues and builds skills that consumers, parents and guardians need to influence legislation effectively and obtain the most appropriate state-of-the-art services for themselves and others. Participants attended eight 2-day training sessions from September through May, excluding December. Each participant also selected a personal project such as serving an internship with a public official or organizing a letter writing campaign or local coalition.

For more information, see the attached news release and list of Partners.



## Texas Planning Council for Developmental Disabilities



4900 North Lamar Boulevard, Austin, Texas 78751-2399  
(512) 483-4080 TDD (512) 483-4099 FAX (512) 483-4097  
Roger A. Webb, Executive Director

Lee Veenker, Chairman  
Shenikwa D. Cox, Vice Chairman

**For Immediate Release**

**April 1992**

**Contacts: Lucy Walker and Jopie Smith**  
(512) 483-4092 483-4089

### **30 Texans Graduate From Partners in Policymaking Program**

There are three types of people: people who make things happen, people who watch things happen and people who wonder what happened. Thirty Texans have spent the last eight months learning how to make things happen.

These individuals, adults with disabilities and parents of children with developmental disabilities, will be honored in Austin on Saturday, May 2, for completing an innovative leadership program. This program analyzes developmental disability issues and builds skills that consumers, parents and guardians need to influence legislation effectively and obtain the most appropriate state-of-the-art services for themselves and others.

Sponsored by the Texas Planning Council for Developmental Disabilities, the training included current issues affecting people with disabilities, best practices, and the policymaking and legislative processes at the local, state and federal levels. Its overall goal is to achieve a productive partnership between people needing and using services and those in a position to make policy and law.

Participants attended eight 2-day training sessions, from September through May. Each participant also selected a personal project such as serving an internship with a public official, or organizing a letter writing campaign or local coalition.

"We strongly believe that individuals who use services should have a major role in determining what services are provided and how they are delivered," explained Roger Webb, executive director of the Texas Planning Council for Developmental Disabilities. "It is really exciting to see the Partners enthusiasm and commitment to improve state and local services."

- more -

## **Partners in Policymaking Program**

page 2

The Planning Council currently is seeking applications for its third Partners in Policymaking program. Applications are due May 15. Monthly training sessions will be held from September through May, excluding December.

For more information on Partners in Policymaking or an application, contact Jopie Smith, Texas Planning Council for Developmental Disabilities, 4900 North Lamar Blvd., Austin, Texas 78751-2316 or call (512) 483-4089.

- 30 -

**Note to Editor:** The Texas Planning Council for Developmental Disabilities is a 29-member board, appointed by the governor, whose mission is to plan and advocate for the independence, productivity and community integration of people with developmental disabilities.

Developmental disabilities are severe, chronic disabilities that occur before the age of 22 and that limit a person's participation in three or more of the following major life activities: self-care, self-direction, learning, language, mobility, independent living and economic self-sufficiency. Examples of developmental disabilities include autism, cerebral palsy, epilepsy, severe mental retardation, deaf-blindness, chronic mental illness and various birth defects.

**PARTNERS IN POLICYMAKING**

**PARTNERS II POST-GRADUATE TRAINING**

**December 4-5, 1992**

**Stouffer Austin Hotel  
9721 Arboretum Blvd.  
Austin, Texas**

**Friday December 4, 1992**

- 12:30 p.m. - 1:00 p.m. Registration - *San Antonio Room*
- 1:00 p.m. - 2:00 p.m. What's Been Happening Since May?  
Partners
- 2:00 p.m. - 5:00 p.m. Building Personal Credibility & Influence  
Les Wallace, Ph.D.  
Signature Resources  
Denver, CO
- 5:00 p.m. - 5:30 p.m. Break/Social Time
- 5:30 p.m. - 7:00 p.m. Dinner - *Pecos Room*
- 7:00 p.m. - 9:00 p.m. Building Personal Credibility & Influence - *San Antonio Room*  
Les Wallace, Ph.D.

**Saturday, December 5, 1992**

- 7:30 a.m. - 8:30 a.m. Breakfast - *San Antonio Room*
- 8:30 a.m. - 11:45 a.m. Building Alliances  
Shafik Abu-Tahir  
New African Voices Alliance  
Philadelphia, PA
- 11:45 a.m. - 1:00 p.m. Lunch - *Sabine Room*
- 1:00 p.m. - 2:30 p.m. Partners' Project Reports - *San Antonio Room*
- 2:30 p.m. - 3:00 p.m. Wrap-up and Evaluation  
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\*                   Texas Partners                   \*  
\*  
.....

**NEGOTIATION SKILLS WORKSHOP**  
for  
**PARTNERS IN POLICYMAKING GRADUATES**

Sponsored by  
Governor's Planning Council  
on Developmental Disabilities

**BACK BY POPULAR DEMAND!**  
February 4-5, 1993  
Sheraton Midway  
St. Paul

Everyone negotiates constantly--with family members, with co-workers, among others. As a Partners graduate, you also find yourself in other situations in which you want to influence the outcome:

- o working with members of the education team
- o working with county or state staff
- o trying to obtain better decisions from elected policymakers

If you would like to decrease frustrations and increase your effectiveness in these settings, this workshop is for you! It is a repeat of the very successful workshop held last summer which reached its registration limit.

**WHAT YOU WILL LEARN**

- \* The five different types of conflict and appropriate responses for each
- \* How your general approach to conflict affects your negotiating style--advantages and disadvantages
- \* The two prevalent models of negotiation
- \* Tips for effective negotiation
- \* The process--preparation, identifying issues and interests, generating options, breaking deadlocks, drafting agreements

.....  
\* Minnesota Partners \*  
.....

**THE FORMAT**

This intensive workshop includes presentations, role-plays, simulations, plus plenty of opportunity to practice new skills! Many program activities will focus on the types of specific situations encountered by Partners Graduates.

## PROGRAM INFORMATION

### FACULTY

**Marilyne Roberts** is a professor at Hamline University School of Law. Formerly, Ms. Roberts was Assistant Director of the University of Minnesota Student Legal Service and in private practice with a Minneapolis law firm. She has represented environmental organizations in a number of significant rulemaking procedures and has been a delegate to two US/USSR Emerging Leaders Summits. She primarily mediates personal injury, employment and public policy matters for the Center.

**Gary Weissman** is an attorney, mediator and arbitrator in Minneapolis. He has served as Chairperson of the State Bar Association's Family Law Section and was for three years the Section's Arbitration and Mediation Committee Chair. He is a member of the Minnesota Supreme Court/State Bar Association Task Force and the Minnesota Department of Economic Security. He has mediated employment, insurance, business and family matters for Mediation Center for several years. Mr. Weissman earned his J.D. from Georgetown Law School.

**Nancy A. Welsh** is Executive Director of Mediation Center. She is an Adjunct Professor at Hamline University School of Law and served as the Chairperson of the State Bar Association's Alternative Dispute Resolution Committee for three years. Previously, she practiced in the corporate litigation area with the Minneapolis firm of Leonard, Street and Deinard for four years and graduated from Harvard Law School.

### WORKSHOP SITE

Conveniently located midway between downtown St. Paul and Minneapolis at I-94 and Hamline Avenue, the Sheraton Midway has much to offer workshop participants including state-of-the-art meeting space, all of which is totally accessible. A block of sleeping rooms has been reserved for workshop participants who do not live in the Twin Cities area. Indicate your need for such accommodations on the enclosed registration form so that appropriate reservations can be made for you.

### REGISTRATION

Registration for this workshop is limited to 30 people on a first-come, first-serve basis. Completed registration forms must be received by Wednesday, January 20, 1993.

Because funding has been provided by the Governor's Planning Council on Developmental Disabilities, there is no registration fee for this workshop. In addition, registrants will be reimbursed for meal and travel costs plus respite and child care. The cost of double occupancy overnight accommodations will be covered for participants who do not live in the Twin Cities area. Confirmation packets will include a reimbursement form plus reimbursement procedures.

### FOR FURTHER INFORMATION

Barb Croucher (registration)  
Carol Schoeneck (workshop questions)  
Government Training Service  
Suite 401, 480 Cedar Street  
St. Paul, Minnesota 55101  
612/222-7409 or  
Minnesota Toll Free 800/652-9719

### ABOUT GOVERNMENT TRAINING SERVICE



GTS is a public organization providing innovative, comprehensive, practical training and consulting services to publicly-funded organizations in Minnesota. It is providing management services for this workshop.

### CANCELLATION

Participation in this workshop is limited. If after registering you find you cannot attend, please let us know immediately so we can fill your spot!



**Governor's Planning Council  
on Developmental Disabilities**

Minnesota Department of Administration

300 Centennial Office Building  
658 Cedar Street  
St. Paul, Minnesota 55155  
(612) 296-4018 voice  
(612) 296-9962 TDD  
(612) 297-7200 fax

July 2, 1992

Dear Partner:

This packet serves as your final confirmation of attendance at the Summer Institute sponsored by the Governor's Planning Council on Developmental Disabilities. This packet includes:

- Final schedule. Please note beginning and end times.
- A map of the campus including the location of the dorm.
- A floor plan for the dorm, Middlebrook Hall.
- Listing of local attractions.

Those attending the pre-Institute conference should arrive at Middlebrook Hall on Thursday, July 30, 1992, between 3:00 p.m. and 8:00 p.m. The pre-Institute conference entitled Negotiations will begin at 8:30 a.m. on July 31, 1992, and end at 4:30 p.m. on August 1, 1992. If you are enrolled, a description and agenda are included. This session is closed to any new enrollment.

For those attending the Summer Institute, please arrive at Middlebrook Hall between 3:00 p.m. and 5:00 p.m. on Saturday, August 1, 1992.

Casual dress is suggested for the entire Institute. Parking passes will be distributed when you arrive and register at the dormitory. Your final schedule for the sessions will be given to you at registration.

If you have any questions or concerns regarding the Institute, please call Dave Hancox at (612) 349-2560.

Cordially,

  
Colleen Wieck, Ph.D.  
Executive Director

Enclosure

## DAY 1 SCHEDULE

### MINNESOTA SUMMER LEADERSHIP INSTITUTE

#### SATURDAY, AUGUST 1, 1992

<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
3:00 p.m.- 5:00 p.m. 7:00 p.m.- 9:00 p.m.	CHECK IN. Dorm assignments, parking permits assigned. Institute Registration.	Middlebrook Hall, Main Desk (main floor)
5:00 p.m.- 6:15 p.m.	Dinner/Opening Reception.	Middlebrook Deck (first floor); in case of rain, Middlebrook Cafeteria

#### SUNDAY, AUGUST 2, 1992

<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
7:00 a.m.- 8:00 a.m.	Continental Breakfast.	
8:30 a.m.- 9:00 a.m.	Summer Institute Begins.  Overview of Institute.  Introductions of Faculty--Colleen Wieck.	Rarig Theatre; Thea- tre in the Round (second floor)  Rarig Theatre; Thea- tre in the Round (second floor)
9:00 a.m.-10:15 a.m.	Opening Plenary: Inclusion vs. Ex- clusion: Two Roads and PATH (Planning Alternative Tomorrows with Hope)--Marsha Forest and Jack Pearpoint.  Synopsis: A general description of the paradigms of inclusion and exclusion will be described. The outcomes of each road will be dis- cussed. Rationale and strategies provided. PATH is an individual- ized approach to planning your future.	Rarig Theatre; Thea- tre in the Round (second floor)  Rarig Theatre; Thea- tre in the Round (second floor)
10:15 a.m.-10.30 a.m.	Break.	



## SUNDAY, AUGUST 2, 1992

<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
3:00 p.m. - 4:30 p.m. (continued)	<p>C. Networking--Wayne Zimmer. Synopsis: A session to explore and demonstrate the development and use of key human resources, "contacts," in building goals, and achieving targets locally, nationally, and internationally.</p> <p>D. How to Build Alliances--Shafik Abu Tahir. Synopsis: A presentation which stresses the need for interdependence in meeting goals.</p> <p>E. Community Organizing--Carmen Quesada and Dohn Hoyle. Synopsis: A systematic approach to the techniques of organizing, of building and using power, and of creating lasting associations that are both self-defense organizations and avenues for citizen participation in public life.</p> <p>F. Facilitation/How to Use Meetings--Jack Pearpoint and Fran Smith. Synopsis: The how-tos of making meetings useful, relevant, interesting, and fun. Why do some meetings work and others fail? Understanding the rules of the game. Objectives: 1) Understand and practice the rules of running meetings; 2) Practice the roles played in meetings; and 3) Practice graphic facilitation techniques.</p>	<p>C. Terrace Room, Middlebrook Hall (first floor)</p> <p>D. Terrace Room, Middlebrook Hall (first floor)</p> <p>E. Rarig Theatre; Theatre in the Round</p> <p>F. Rarig Theatre; Theatre in the Round</p>

## SUNDAY, AUGUST 2, 1992

<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
4:30 p.m. - 5:00 p.m.	Break.	
5:00 p.m. - 6:00 p.m.	Dinner.	Middebrook Cafe- teria (lower level)
6:00 p.m.	Individual Assignments/Free Time.	

## MONDAY, AUGUST 3, 1992

<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
7:00 a.m. - 8:30 a.m.	Breakfast.	Middlebrook Cafe- teria.
8:30 a.m.-10:00 a.m.	Plenary: Federal and State Issues-- Colleen Wieck, Dohn Hoyle, and Carmen Quesada.	Rarig Theatre; Thea- tre in the Round (second level)
10:00 a.m.-10:30 a.m.	Break.	
10:30 a.m.-12:00 noon	Breakout Session #1--All sessions continued from previous day: A. Transition--Marsha Forest. B. Adult Services--Ed Skarnulis. C. Networking--Wayne Zimmer. D. Building Alliances--Shafik Abu Tahir. E. Community Organizing--Carmen Quesada and Dohn Hoyle. F. Facilitating/How to Use Meet- ings--Jack Pearpoint and Fran Smith.	A. Middlebrook Floor Lounge B. Middlebrook Floor Lounge C. Terrace Room, Middlebrook Hall D. Terrace Room, Middlebrook Hall E. Rarig Theatre; Theatre in the Round F. Rarig Theatre; Theatre in the Round
12:00 noon- 1:00 p.m.	Lunch.	Middlebrook Cafe- teria.

**MONDAY, AUGUST 3, 1992**

<b><u>ME</u></b>	<b><u>ACTIVITY</u></b>	<b><u>LOCATION</u></b>
1:00 p.m. - 2:30 p.m.	<p>Breakout Session #3--All new groups except Community Organizing:</p> <p>A. Adult Services--Ed Skarnulis.</p> <p>B. Accessing County Services--Anne Henry. Synopsis: A study of county-level government, laws governing county action in developmental disabilities, funding issues, recent changes in county case management and techniques and strategies for participating in case management conciliation conferences.</p> <p>C. Negotiations Skills--The Mediation Center. Synopsis: An overview of the types of conflict and the approaches for dealing with conflict.</p> <p>D. Community Organizing (continued)--Dohn Hoyle and Carmen Quesada.</p> <p>F. Facilitating/How to Use Meetings--Jack Pearpoint and Fran Smith.</p> <p>G. Independent Living--Ed Roberts.</p>	<p>Rarig Theatre; Theatre in the Round (second level)</p> <p>A. Middlebrook Floor Lounge</p> <p>B. Terrace Room, Middlebrook Hall</p> <p>C. Rarig Theatre; Theatre in the Round</p> <p>D. Rarig Theatre; Theatre in the Round</p> <p>F. Terrace Room, Middlebrook Hall</p> <p>G. Fishbowl, Middlebrook Hall</p>
2:30 p.m. - 3:00 p.m.	Break.	
3:00 p.m. - 4:30 p.m.	<p>Breakout Session #4--All continued from Session #3:</p> <p>A. Adult Services--Ed Skarnulis.</p>	<p>A. Middlebrook Floor Lounge</p>

**MONDAY, AUGUST 3, 1992**

<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
3:00 p.m.- 4:30 p.m. (continued)	B. Accessing County Services-- Anne Henry. C. Negotiations Skills--The Media- tion Center. D. Community Organizing (contin- ued)--Dohn Hoyle and Carmen Quesada. E. Facilitating/How to Use Meet- ings--Jack Pearpoint and Fran Smith. F. Independent Living--Ed Roberts.	B. Terrace Room, Middlebrook Hall C. Rarig Theatre; Theatre in the Round D. Rarig Theatre; Theatre in the Round E. Terrace Room, Middlebrook Hall F. Fishbowl, Middle- brook Hall
4:30 p.m.- 5:00 p.m.	Break.	
5:00 p.m.- 6:00 p.m.	Dinner.	
6:00 p.m.- 8:00 p.m.	Team Assignments.	

**TUESDAY, AUGUST 4, 1992**

<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
7:00 a.m.- 8:30 a.m.	Breakfast.	Middlebrook Cafe- teria.
8:30 a.m.-10:00 a.m.	Breakout Session #5: This begins a new set of sessions: A. Accessing County Services-- Anne Henry. B. Networking--Wayne Zimmer. C. Building Alliances--Shafik Abu Tahir. D. State Strategies/Systems Advoca- cy--Dohn Hoyle and Carmen Quesada. Synopsis: A practicum in cam- paign planning including the de- velopment of a campaign strat- egy chart to effect systemic change.	Rarig Theatre; Thea- tre in the Round (second level) A. Terrace Room, Middlebrook Hall B. Terrace Room, Middlebrook Hall Round C. Rarig Theatre; Theatre in the Round D. Rarig theatre; Theatre in the Round

## TUESDAY, AUGUST 4, 1992

<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
10:00 a.m.-10:30 a.m.	Break.	
10:30 a.m.-12:00 noon	Breakout Session #6: All sessions continued from #5:  A. Accessing County Services--Anne Henry. B. Networking--Wayne Zimmer.  C. Building Alliances--Shafik Abu Tahir.  D. State Strategies/Systems Advocacy--Dohn Hoyle and Carmen Quesada.	Rarig Theatre; Theatre in the Round (second level) A. Terrace Room, Middlebrook Hall B. Terrace Room, Middlebrook Hall C. Rarig Theatre; Theatre in the Round D. Rarig Theatre; Theatre in the Round
12:00 noon- 1:00 p.m.	Lunch.	Middlebrook Cafeteria
1:00 p.m.- 2:00 p.m.	Plenary--Ed Roberts.	Rarig Theatre; Theatre in the Round (second level)
2:00 p.m.- 2:30 p.m.	Break.	
2:30 p.m.- 4:30 p.m.	Breakout Session #7:  A. Fundraising--Wayne Zimmer. B. Independent Living--Ed Roberts. C. State Strategies--Dohn Hoyle and Carmen Quesada.  D. Facilitating/How to Use Meetings--Jack Pearpoint and Fran Smith. E. Transition--Marsha Forest.  F. Building Alliances--Shafik Abu Tahir.	Rarig Theatre; Theatre in the Round (second level) A. Terrace Room, Middlebrook Hall B. Terrace Room, Middlebrook Hall C. Rarig Theatre; Theatre in the Round D. Rarig Theatre; Theatre in the Round E. Middlebrook Floor Lounge F. Middlebrook Floor Lounge



**TUESDAY, AUGUST 4, 1992**

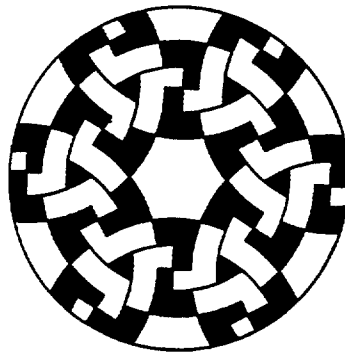
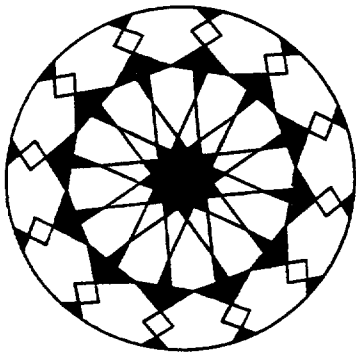
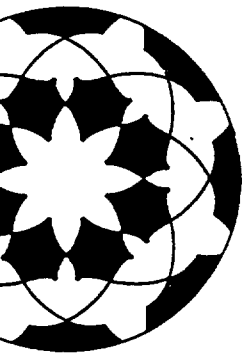
<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
4:30 p.m.- 5:00 p.m.	Break.	
5:00 p.m.- 6:00 p.m.	Dinner.	Middlebrook Cafeteria
6:00 p.m.- 8:00 p.m.	Comedy Hour.	Middlebrook Deck (first floor); in case of rain, Middlebrook Cafeteria

**WEDNESDAY, AUGUST 5, 1992**

<u>TIME</u>	<u>ACTIVITY</u>	<u>LOCATION</u>
7:00 a.m.- 8:30 a.m.	Breakfast.	Middlebrook Cafeteria.
8:00 a.m.- 8:30 a.m.	Evaluation--Tom Zirpoli.	Rarig Theatre; Theatre in the Round (second level)
8:30 a.m.-12:00 noon	Partners Report Out to the Council Members. (The Partners will organize this session to summarize the work of the Institute.) Recognition of Outgoing Council Members; Duane Shimpach, Chair, DD Council.	Rarig Theatre; Theatre in the Round (second level)
12:00 noon- 1:00 p.m.	Lunch.	Middlebrook Cafeteria

*This Is Your Invitation  
To The  
1993 Minnesota Summer Leadership Institute*

SHIFTING



PATTERNS

**July 18-20, 1993  
Radisson Hotel South  
Bloomington, Minnesota**

Sponsored by the  
Minnesota Governor's Planning Council  
on Developmental Disabilities

As a graduate of the Partners in Policymaking Program, you know that patterns are shifting in the world of developmental disabilities. You've seen that beliefs and attitudes are changing — about an individual's personal capabilities and possibilities, about accessing services and the importance of community. You are part of making this happen!

The 1993 Leadership Institute offers an opportunity to add to your information and skills so that you can continue to act on your vision, make informed choices, and take advantage of the resources at hand. Join other Partners grads from around the country for nearly three days packed with practical in-depth workshops, inspirational presentations, networking, personal advisements and the opportunity to connect with an international faculty from a variety of fields. Each participant will receive an extensive packet of publications and handout materials.

On the light side, other program features include the fun of a trip to the famous Mall of America on Monday night and a special Comedy Hour as part of the Tuesday evening finale. The Institute is a "don't miss" for all — whether you attended in 1992 or not!

## Program Schedule

### SUNDAY, JULY 18, 1993

8:30-11:30 a.m.	Institute Registration
11:30- 1:00 p.m.	Kickoff Luncheon and Introductions
1:15- 2:30	Opening Session Keynote — A Celebration of Partners
2:30- 5:00	Getting to Know One Another — Building Teamwork
5:00- 7:00	Dinner on Your Own
7:00- 9:00	Topical Roundtables Dessert Reception

### MONDAY, JULY 19, 1993

7:00- 8:30 a.m.	Continental Breakfast
8:30-11:30	Ten All-Day Classes Choice #1
11:30-12:30 p.m.	Lunch
1:00- 2:00	General Session Ed Roberts
2:30- 5:00	Ten All-Day Classes (Continued)
5:15- 6:15	Buses Leave for Mall of America Dinner on Your Own
7:00- 9:00	Media Room (Program Option to Mall of America)

### TUESDAY, JULY 20, 1993

7:00- 8:30 a.m.	Continental Breakfast
8:30-11:30	Ten All-Day Classes Choice #2
11:30-12:45 p.m.	Lunch
1:00- 2:00	General Session Shafik Abu-Tahir
2:30- 5:00	Ten All-Day Classes (Continued)
5:30- 6:30	Celebration Banquet
6:45- 7:45	An All-New Comedy Hour
7:45- 9:00	Testimonials by Panel of Participants
9:00	Institute Adjourns

## Participants Choose Two Full-Day Workshops From This List of Valuable Topics and International Faculty

### 1. Building Alliances through Trust and Interpersonal Relationships

This session will focus on how to organize around an issue, recognizing the value and necessity of promoting cultural diversity in the process. Learn how to break down barriers between people and build trust, how to identify problematic areas and work together with others to bring forth resolution and accomplish project goals. Become more sensitive to the importance of human relationships and the value of collectivizing concerns.

*Presenter: Shafik Abu-Tahir*

### 2. Community Organizing: Grass Roots Empowerment to Achieve Advocacy Goals

This program will introduce participants to community organizing/empowerment as an approach to address problems and issues. Learn how to gain power or influence those who have it through organizing in order to achieve specific changes and outcomes. Discussion will be on specific grassroots strategies such as letter-writing, testifying and meeting public officials, using the media, meetings that get the right people in the right place at the right time.

*Presenter: Dohn Hoyle*

### 3. Effective Presentations

This session answers the fundamental questions on how to deliver an informative and effective presentation. Proven techniques will be presented, focusing on the skills necessary to increase confidence, enthusiasm and persuasiveness. Learn how to use body language effectively, how to organize ideas and data for maximum impact, plus how to develop and use visual aids. Participants will have the chance to practice giving a short presentation on the topic of their choice for informal critique. By discussing some simple, practical suggestions, we can take the fear out of making presentations and actually make it fun. This non-threatening session will have no videotaping!

*Presenter: Teresa Elkin*

### 4. Marketing Yourself

This session will help you develop your personalized approach to meeting new people and getting the resources you need through local, national and international "contacts!" Learn the meaning and value of networking. Presentations and exercises will help you build your social skills, overcome your fears, and practice "gold-digging" for information. Discover how to "create your own rolodex," using various techniques for recording information and keeping it handy.

*Presenter: Wayne Zimmer*

### 5. Meetings Matter

Meetings to share information, to plan, to decide, and/or to evaluate are important. Learn how you can make a difference in any kind of meeting, whether you are leading, participating or observing. Participation in this session will equip you with principles of adult learning and how to use them, strategies to keep the energy of the group on task, tips for turning groups into teams, keys to handling conflict constructively, and practical ideas for varying the meeting format.

*Presenter: Fran Smith*

## 6. Negotiation Skills

Learn to achieve your negotiating goals more effectively by discovering the difference between the two major types of negotiation — positional bargaining and interest-based negotiation. Begin to identify issues and interests and learn the power of this tool. Practice negotiation skills; build your confidence; have some fun!

*Presenter: Marilynne Roberts*

## 7. The Power of Disability

This session offers a conversation with the international leader of the independent living movement. This dialogue is guaranteed to be inspirational and give you a different perspective on your own life.

*Presenter: Ed Roberts*

## 8. The Practice of Politics

This workshop, a combination of theory and techniques, will provide answers to the questions: why politics, what is politics, who decides, how can you influence political decisions and what are the risks? Learn why you should be actively involved and how to do it — through Political Action Committees, participating in party politics and endorsing candidates and/or ballot initiatives. Make the political process work to meet your goals!

*Presenter: Carmen Quesada*

## 9. School Inclusion

This session is designed to help you become a successful advocate for inclusion within the school setting. Learn how to identify which schools value diversity as well as what adaptations and curricular modifications can be used to effectively include students with developmental disabilities in "regular" preschools, elementary and secondary schools. Become aware of recent research findings and best practices. Discover how to facilitate friendships between students with and without developmental disabilities and how to support and advocate for families seeking inclusion for their children in general education.

*Presenter: Mary Falvey*

## 10. SPECIAL COMBINED PROGRAM: Accessing Minnesota's Resources

**Part I (morning) — County Services:** Learn about county level government, laws governing county action in developmental disabilities, funding issues, recent changes in county case management, plus how to participate in a case management conciliation conference.

*Presenter: Staff, Minnesota Protection and Advocacy Agency*

**Part II (afternoon) — Funding for Technology:** This session will provide an overview of the funding resources available for assistive technology devices (tools that can help make a person more independent at home, school, work, in the community or other settings). Minnesota resources to be discussed include Medial Assistance, Special Education, Vocational Rehabilitation, Services for Children with Handicaps, and the PASS Plan.

*Presenter: Diane Hemmersbaugh*

## Faculty Listing

**Shafik Abu-Tahir**, Executive Director/Co-Founder, Community Awareness Network and organizer of New African Voices Alliance, two Philadelphia organizations which have played significant roles in uniting people in the struggle for better city services and around issues of social justice; has served on numerous community boards and received city and state recognition for community organizing; national advocate for people with disabilities

**Teresa Elkin**, Coordinator and Trainer for Business and Industry, Customized Training Division, Northwest Technical College, Detroit Lakes, Minnesota; former positions held in the employment and training field, sales and counseling with plenty of opportunity to utilize her ideas on making presentations

**Mary Falvey**, Professor of Education, California State University, Los Angeles; has held leadership positions in a wide variety of advocacy organizations for persons with disabilities; national expert and author on educating students with and without disabilities in integrated settings

**Diane Hemmersbaugh**, Funding Specialist, Minnesota STAR Program; former Legislative Staff Assistant for U.S. Senator John Kerry (D-MA) and Associate Director of Governmental Affairs for the National Mental Health Association

**Dohn Hoyle**, President/CEO, Washtenaw Association for Community Advocacy — Advocating for Persons with Developmental Disabilities; has chaired, convened or participated in numerous local, state and national advocacy groups working on behalf of persons with developmental disabilities; author, consultant, trainer

**Carmen Quesada**, Organizational Specialist, National Education Association; consultant and trainer in political organizing and legislative advocacy; successfully lobbied for changes in state statutes during her previous position as Executive Director of the Association for Retarded Citizens/Texas

**Ed Roberts**, President of the World Institute on Disability, a public policy organization that promotes the inclusion of all people with disabilities into the mainstream of life; founder of the Center for Independent Living in Berkeley, California; former Director of the Department of Rehabilitation; a pioneer and promoter of civil rights for people with disabilities nationally as well as internationally

**Marilynne Roberts**, Professor, Hamline University School of Law; mediator and trainer with The Mediation Center in St. Paul, Minnesota (primarily mediating in areas of personal injury, employment and public policy matters); has represented environmental organizations in a number of significant rulemaking procedures and has been a delegate to two US/USSR Emerging Leaders Summits

**Fran Smith**, Consultant on Empowerment and Family Support, Richmond, California; parent of daughter and son with disabilities and Consultant to State Developmental Disabilities Councils and non-profit advocacy organizations at the local, state and national levels; frequent co-editor, Family Support Bulletin

**Wayne Zimmer**, Consultant in Economic Development and Human Services, Saskatchewan, Canada; has 20 years experience as CEO in community development and human services organizations including facilitating development of a recycling plant which fully employed 200 persons with disabilities; has extensive experience in small business ventures, politics and various rehabilitation organizations and speaks extensively worldwide.

## Location

The Radisson Hotel South, located at 7800 Normandale Boulevard (intersection of highways I-494 and 100) in Bloomington, Minnesota (612/835-7800) has been selected as the site for the Leadership Institute. One of Minnesota's finest convention facilities and located just minutes from Minneapolis/St. Paul International Airport, the hotel has much to offer participants. Amenities include indoor pool and saunas, three unique dining locations, state-of-the-art meeting space, and richly appointed guest rooms and suites. **NOTE: Those requiring accessible shuttle service to/from airport or to/from Mall of America must register by May 1!**

A block of sleeping rooms has been reserved for conference participants on Saturday-Tuesday nights at the reduced rate of \$72/person per night (single or double occupancy). Those needing overnight accommodations should complete and return the appropriate form(s) included in this packet by the date indicated.

## Registration

Because funding has been provided by the Minnesota Governor's Planning Council on Developmental Disabilities, there is no registration fee for this conference.

Registration is, however, limited to 200 people (125 from Minnesota and 75 from other states), on a first-come, first-serve basis. **Completed registration forms should be received as soon as possible, but no later than June 1, 1993.** Confirmation packets will be mailed with complete details.

## Scholarships

Fifty scholarships of \$300 each are available for non-Minnesota participants who would not be able to attend without financial assistance and will be awarded on a first-come basis. This funding is made possible by an Administration on Developmental Disabilities National Grant of Significance in the area of Empowerment and Family Leadership. See enclosed registration form for details.

## Continuing Education Credits

The Institute carries 1.8 Continuing Education Units (CEUs) at no cost to registrants. The CEU is defined as 10 contact hours of participation in an organized continuing education experience under responsible sponsorship, capable direction, and qualified instruction. Conference CEUs are on record with North Hennepin Community College.

## For Further Information

Barb Croucher (for registration assistance)  
Carol Schoeneck (for program questions)  
Government Training Service  
Suite 401, 480 Cedar Street, St. Paul, Minnesota 55101-2240  
(612) 222-7409 or Minnesota Toll Free (800) 652-9719

TDD service is available through the Minnesota Relay Service. To access, call as follows:

- Those inside the Twin Cities Metropolitan Area — 297-5353
- Those outside the Twin Cities Metropolitan Area but inside the State of Minnesota — 1/800-657-3529
- Those outside the State of Minnesota — 1/612-297-5353

## Cancellation

Participation in this Conference is limited. If after registering you find you cannot attend, please let us know immediately so someone else can fill your spot!

Should inclement weather (or other circumstances beyond our control) necessitate program cancellation or postponement, participants will be notified.



### About Government Training Service

*Recipient of Organizational Support for Excellence in Training Award (American Society for Training and Development)*

Program planning and management services for this Conference have been provided by Government Training Service. GTS is a public organization whose mission is to meet the changing management and leadership needs of policymakers, staff and appointed officials by providing innovative, comprehensive, practical training and consulting to publicly-funded organizations in Minnesota.

# 1993 Minnesota Summer Leadership Institute

July 18-20, 1993  
Bloomington, Minnesota

## Non-Minnesota Registration Form

You must make your own overnight reservations at the Radisson South Hotel.  
Use the reservation envelope enclosed in this mailing.

Name (please print) \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Daytime Phone Number ( \_\_\_\_\_ ) \_\_\_\_\_ Partners Graduation Year \_\_\_\_\_

Social Security # (only if requesting CEUs) \_\_\_\_\_

### **SCHOLARSHIPS:**

- Yes, I need a scholarship to attend this Conference.  
(NOTE: Since these funds are limited and will be awarded on a first-come, first-serve basis, early application is encouraged!)

### **ACCOMMODATION NEEDS:**

- Wheelchair accessible space in meeting room
- Alternative meal selection (check one):  vegetarian  special diet (specify) \_\_\_\_\_
- Sign Language Interpreter
- Facilitator Support or other personal assistance (please specify) \_\_\_\_\_

### **ADDITIONAL MATERIAL NEEDS (in substitution for written materials only):**

- Large print  Braille  Audiotapes

So that appropriate plans can be made, please indicate below which sessions and events you will be attending:

Monday and Tuesday All-Day Workshops (While we will make every effort to accommodate your top two choices, please provide us with two alternatives. List by workshop number indicated elsewhere in this brochure.)

- #1 Choice \_\_\_\_\_  #2 Choice \_\_\_\_\_  #3 Choice \_\_\_\_\_  #4 Choice \_\_\_\_\_

Monday Evening Transportation to Mall of America

- Yes (  I require a lift equipped and/or accessible vehicle.)  No

Tuesday Evening Banquet

- Yes  No

Wednesday Breakfast

- Yes  No

To assist us in arranging for Sunday evening networking topics, please indicate the most critical disability issue you currently face:

Return this form by June 1 to:  
Government Training Service, Suite 401, 480 Cedar Street, St. Paul, Minnesota 55101-2240.

**1993 Partners in Policymaking National Academy**  
**The Stouffer Hotel**  
**Austin, Texas**  
**May 20-22, 1993**

**SECTION VII - 1992 NATIONAL ACADEMY**  
**Table of Contents**

This portion of the notebook contains a summary of the 1992 Partners in Policymaking National Academy, which was prepared by Colleen Wieck, Ph.D., Executive Director of the Minnesota Governor's Planning Council on Developmental Disabilities. The Minnesota Council received the federal grant which supports the Academies.

This summary provides basic information on Partners in Policymaking, including creative ideas for implementing successful programs, which was generated by participants of the 1992 National Academy in Dallas, Texas.

The summary includes:

Where are the Partners programs?	Page 168
What are the purposes and values of Partners?	Page 169
What distinguishes Partners?	Page 169
How are Partners selected?	Page 172
What supports are necessary?	Page 175
How to staff and budget.	Page 178
What happens after graduation?	Page 181
What else do you want to know?	Page 183

**1993 Partners in Policymaking National Academy**

**For Your Notes:**



**Governor's Planning Council  
on Developmental Disabilities**

*Minnesota Department of Administration*

300 Centennial Office Building  
658 Cedar Street  
St. Paul, Minnesota 55155  
(612) 296-4018 voice  
(612) 296-9962 TDD  
(612) 297-7200 fax

June 30, 1992

Dear Colleague:

On behalf of the 1992 National Partners Academy Planning Committee, I am pleased to send you a copy of the conference proceedings. Based on the work of every participant at the Academy, the enclosed document reflects your best efforts. Thank you again for attending and providing your enthusiasm, creativity, and reflection.

I want to reiterate that Fran Smith will be following up with each new state coordinator to discuss technical assistance needs. Jopie Smith, Ed Roberts, Kathie Snow, David Hancox, and I are also very willing to discuss Partners with you. We also encourage you to call upon each other.

In the meantime, we are preparing a binder for Partners coordinators that will focus on competencies, speakers, and readings.

I look forward to our 1993 Academy.

My very best wishes to each of you.

Cordially,



Colleen Wieck, Ph.D.  
Executive Director

CW/amc

**This report was prepared by the staff of the Minnesota Governor's Planning Council on Developmental Disabilities. For additional copies, please call or write:**

**Minnesota Governor's Planning Council  
on Developmental Disabilities  
300 Centennial Office Building  
658 Cedar Street  
St. Paul, Minnesota  
(612) 296-4018 voice  
(612) 296-9962 TDD.**

**The Academy was funded in part through grant number 90DD0221 under provisions of the Developmental Disabilities Act of 1990 (P.L. 101-496). Content of this proceedings does not reflect the position or policy of the Administration on Developmental Disabilities nor the Department of Health and Human Services.**

**PROCEEDINGS OF THE  
1992 NATIONAL PARTNERS IN POLICYMAKING ACADEMY**

**SUMMARY**

Doubletree Hotel at Lincoln Center  
5410 LBJ Freeway  
Dallas, Texas 75240

Sponsored by:

Texas Developmental Disabilities Planning Council  
Minnesota Governor's Planning Council  
on Developmental Disabilities  
World Institute on Disability

May 14-16, 1992

**PROCEEDINGS OF THE  
1992 NATIONAL PARTNERS IN POLICYMAKING ACADEMY**

**SUMMARY**

**WHERE ARE THE PARTNERS PROGRAMS?**

On May 14-16, 1992, the Second Academy on Partners in Policymaking was funded by the Administration on Developmental Disabilities with a grant awarded to the Minnesota Governor's Planning Council on Developmental Disabilities in conjunction with the Texas Developmental Disabilities Planning Council, and the World Institute on Disability. In 1990, 13 states attended the Partners Academy held in Berkeley, California, including:

- Alabama,
- California,
- Colorado,
- Connecticut,
- Illinois,
- Indiana,
- Iowa,
- Louisiana,
- Minnesota
- New York,
- Ohio,
- Texas, and
- Virginia (did not attend 1992 Academy).

Twelve new states made a commitment to begin Partners and joined the existing states at the 1992 Academy:

- Arkansas,
  - Delaware,
  - Florida,
  - Georgia,
  - Hawaii,
  - Mississippi
  - New Mexico,
  - North Carolina,
  - Oklahoma,
  - South Dakota,
-

- Tennessee, and
- West Virginia.

### **WHAT ARE THE PURPOSES AND VALUES OF PARTNERS?**

Partners promotes families, community inclusion, self-determination, independence, and productivity of all persons with developmental disabilities. It is a competency and outcome based training program for people with developmental disabilities and their families. Specifically, the goal of Partners in Policymaking is to train people with developmental disabilities and their families with skills to enable them to carry out the purposes of the DD Act:

to advocate for public policy change and community acceptance of all people with developmental disabilities and their families so that such persons receive the services, supports and other assistance and opportunities necessary to enable such persons to achieve their maximum potential through increased independence, productivity and integration into the community;

to promote the inclusion of all persons with developmental disabilities, including persons with the most severe disabilities, in community life;

to promote the interdependent activity of all persons with developmental disabilities, including persons with the most severe disabilities.

(DD Act [P.L. 101-496]  
Section 2, subsec. 101)

### **WHAT DISTINGUISHES PARTNERS?**

The first question asked of the 85 Academy participants was, "What distinguishes Partners in Policymaking from all other existing training programs?"

The response was overwhelming. Seventy-two statements have been summarized into three categories: (a) design, (b) content/format, and (c) results.

#### **Design**

1. Good recruitment, screening, and selection are critical.
2. Participants share common values.
3. Diversity of disabilities and experiences of participants.
4. Consumers, parents, and professionals all learn together.

5. Unifies families and individuals with disabilities.
6. Partners is part of the community not located in segregated sites.
7. Project directors are committed to the success of the program and find money to make it happen.
8. It is not an organization.
9. It is a process, not a program.
10. Partners is flexible so that each state can address internal issues.
11. It keeps changing.
12. Program is built on respect.
13. Money for Partners is actually spent on trainees.
14. Everything is paid for.
15. Choice of presenters influences competencies.
16. Provides opportunities to personally meet and learn from national leaders--Presenters.
17. Long-term training, not just one shot.
18. Puts money where mouth is: it is accessible.
19. Opportunity to share goals/interests after hours.
20. Provides respite for participants on training weekends.
21. Gives us something to do on Monday morning.

### **Content/Format**

1. Values-based approach, not adversarial.
2. Educates participants on law and options.
3. Learn public speaking skills.

4. Provides opportunities for practice and role playing, drawing on experiences of participants.
5. Diversity of speakers provides many perspectives.
6. Offers strategies for networking and ongoing support among participants.
7. Individuals come together many times over the year. Intensity and in-depth approach, over time.
8. It takes a full year to get to know others and grow in confidence.
9. Time between sessions and homework assignments help participants work on competencies/needs.
10. Group validates shared goals, vision, and interests among Partners.
11. Participant diversity (adults/families) gives overview of long-term goals.
12. Provides environment to promote enthusiasm and build bridges.
13. Shows that advocacy can be fun—gives back control.
14. Helps you do things you never thought you could.
15. Gives you freedom to be yourself among participants.
16. Flexibility in format promotes bonding with other participants and staff.
17. Commitment grows.

### **Results**

1. Partners builds self-confidence and positive self-esteem.
2. Partners become aware of own role and importance of speaking up.
3. Participants learn to put their mouth where the money is.

4. Process fosters self-creation in addition to self-determination.
5. Participants gain recognition and credibility as Partners graduates.
6. Partners learn to kick ass with style!
7. Leadership development is individually paced--each person has an "Individual Power Plan."
8. Friendships develop.
9. Linkages are established between individuals with disabilities and family members. Everyone realizes the common bond.
10. Partners pass the torch to next generation: changes old guard to new guard.
11. Promotes networking with advocacy groups within state.
12. Graduates are perceived as successful.
13. Partners gain influence in home community.
14. Partners is "love in action"--accepted as consumers, not trouble-makers.
15. Partners is results oriented and creates a unified force within the state.
16. Opportunities to meet others via national academy.
17. It works--and is growing like wildfire.

#### **HOW ARE PARTNERS SELECTED?**

Every participant who attended the Academy received a large three-ring binder which contained numerous examples of how states are implementing Partners.

The Academy offered an opportunity for participants to share additional ideas. The proceedings offer a summary of all these groups discussions.



In terms of recruitment, screening, and selection, the participants had these suggestions:

### **Recruitment**

1. **Outreach to Minorities:**
  - Print multilingual brochures;
  - Establish contact with leaders "in" the community; and
  - Use existing minority groups and organizations.
  
2. **Educational System:**
  - Schools;
  - Parent groups;
  - Early intervention programs; and
  - Colleges—Centers for Students with Disabilities.
  
3. **Disability Organizations:**
  - Arcs, UCPs, service providers, agencies—newsletters;
  - DD Council newsletters—notices;
  - Independent living centers;
  - Recreation—camps; and
  - Nursing homes.
  
4. **Community Organizations:**
  - Flyers—bank statements, utility bills, employers;
  - League of Women Voters;
  - Presentations at civic groups; and
  - Churches—bulletins.
  
5. **Medical Community:**
  - Pediatricians;
  - Pediatric neurologists, ophthalmologists;
  - Genetic screening;
  - Clinics; and
  - Hospitals.
  
6. **Media/PR:**
  - Public appearances;
  - Celebrity spokesperson;
  - Local cable stations;
  - Newspapers;
  - Public radio—radio PSAs;

- Talk shows; and
- Press releases.

7. Other:

- Social service departments;
- Military bases;
- Social Security offices;
- Community connection projects; and
- Word of mouth--Partners graduates.

### Screening

Screening of applicants should utilize some consistent process and guidelines--the following lists were developed:

1. Personal interviews after final selections to ensure commitment.
2. Establish guidelines to *ensure diversity (this task takes work!)*:
  - Types of disability (stretch the definition);
  - Number of men and women;
  - Age of person with disability or age of family member;
  - Willingness to make time commitment;
  - Minority representation;
  - Rural/urban/suburban mix;
  - Preference for individuals with little or no advocacy experience (but should only be a guideline and not an absolute--nothing is absolute);
  - Commitment to community inclusion for everyone;
  - Person with disability/parents/extended family members;
  - Household structure;
  - Motivation to change system, not just personal gain (positive frustration level);
  - References;
  - Unserved; and
  - Age of child.

### Selection

1. Selection Committee:
  - Each application is read, reviewed, and ranked (top 35 with 10 alternates); and
  - Interview if possible (by phone or in person).

2. Selection Committee makeup:
  - Partners graduates--local or from other states;
  - Consumers;
  - Individuals who have the "Partners value base";
  - Should be an odd number; and
  - Council, P & A, UAP representatives.
3. Keep selection committee membership confidential.
4. Keep applicant names confidential from the selection committee.
5. Be able to discern and read between the lines of the applications--who is seeking self-help and not leadership? Who is committed to the values of the DD Act?

### **WHAT SUPPORTS ARE NECESSARY?**

A critical concern of providing leadership training to a diverse group of people is to provide supports that match needs. Half the participants were assigned to groups to discuss supports. The recommendations are listed below:

#### **Individual Supports**

1. Before and during meetings, attention should be given to materials developed in a medium that all participants can understand, i.e., individualized written material, name tags with pictures, large print, tape recorders, videotapes, and readers.
2. Identify people to support Partners after the training, e.g., graduate Partner paired with new person for follow-up support.
3. Provide financial support for individual projects and reimbursement for expenses (during and after): room, mileage, meals, travel, phone calls, and lost wages.
4. Arrange accessible accommodations and materials, handouts, etc., interpreters, videos, language.
5. Provide reimbursement for personal care and nursing/respice care.
6. Establish mentorships with past graduates.
7. Provide trained attendants/facilitators to assist participants in understanding concepts.

8. Allow time for participant networking--provide addresses, phone numbers, etc.
9. Provide for individual dietary needs/environmental needs.
10. Handle hotel accommodations, transportation options, and car pools.
11. Allow for courteous and knowledgeable public relations personnel.
12. Give information about dress codes.
13. Give information about emergency procedures.
14. Allow sufficient break time (mingle, naps).
15. Encourage Partners to help each other--room together.
16. Establish a toll-free number.

### **Cultural Relevance**

Respect for cultural diversity can be promoted by the following suggestions:

1. Employ staff from cultures you are trying to reach.
2. Select presenters who represent cultural diversity of the state.
3. Identify commonalities of all cultures.
4. Make interpreters available who embrace "values" of Partners.
5. Provide cultural diversity training.
6. Translate materials.
7. Establish and promulgate ground rules.
8. Recognize various languages/culture.
9. Provide interpreters and bilingual facilitators.
10. On application or personal profile allow opportunity to state cultural preference (i.e., diet, options).

11. Educate participants/presenter, interpreters of colloquial/language expressions.
12. Inform presenters of make-up of group (number of parents, individuals with disabilities, etc.).
13. Be intentional about choosing people from all parts of state.
14. Find people who know how to access community.
15. Encourage participants to share about culture (how they relate to disabilities).

### **Bonding**

The following opportunities to strengthen bonding were generated by participants:

1. Plan after-hours extracurricular activities, e.g., "bar-bonding."
2. Arrange different roommate every month.
3. Use ice-breaker activities at each session.
4. Invite "families" to attend graduation--or attend one weekend.
5. Organize a directory of participants with brief bios and picture of family before Partners begin.
6. Sponsor reunions.
7. Establish a relaxed atmosphere in which participants feel safe to express self.
8. Establish group projects and cooperative learning.
9. Trainers/facilitators include interactive discussions.
10. Mechanism to identify prior participants.
11. Allow time for participants to share personal stories.
12. Allowing time for all to give input.
13. Coordinators need to personalize (i.e., personal notes).

14. Use collaborative learning methods (assigned groups—everyone has an assigned role—equally valued assignment).
15. Establish phone chains.
16. Advanced publicity should indicate dress casually/comfortably.
17. Use personal contacts, e.g., personal invitation to apply, a name to call.

## **HOW TO STAFF AND BUDGET**

The remaining Academy participants focused on the staff roles and budget of Partners.

### **Budget**

Participants shared methods of funding Partners:

1. Sufficient funds to support project in its entirety including:
  - Travel;
  - Hotel;
  - Speakers;
  - Personal care assistants;
  - Interpreters;
  - Translators;
  - Staff;
  - Mailings;
  - Materials;
  - Phone utilities;
  - Supplies;
  - Salaries;
  - Office; and
  - Miscellaneous.
2. Obtain long-term funding—funds for postgraduate activities and advanced training.
3. Develop "funding partnerships" outside the traditional DD funding track (accessing other public as well as private money foundations).
4. Get whatever you can get.
5. "Partners" is a package, need to do the whole package.

6. "See three-ring binder" for diversity of disability supports.
7. Allow for a diversity of disability supports.
8. Obtain matching funds.
9. Look at other avenues to develop budget through interagency agreements.
10. Stay flexible.
11. Plan well.
12. Market.

### **Staff Roles**

Staff to Partners have many roles and perform numerous tasks. Some are:

1. **Coordination:**
  - Curriculum/materials;
  - Scheduling/speakers;
  - Accessible transportation/accommodations;
  - Facilitators--before/after training sessions;
  - Personal care assistants;
  - Recruitment/screening;
  - Mailings;
  - Supplies--notebooks, journals, paper, etc.;
  - Budgets/expenses/reimbursements; and
  - Hotel arrangements.
2. **Public Relations:**
  - Promote Partners in the state;
  - Disseminate information;
  - Mediate differences; and
  - Explain Partners to others/potential funders.
3. **Role Models:**
  - Allow participants to be in control of themselves; and
  - Follow lead of participants/be nondirective.
4. **Source Of/Back Up to Staff:**
  - Partners graduates;

- Volunteers (on-site—between sessions);
- Independent contractors; and
- Clerical.

**5. Logistics—Hotels/Meetings:**

- Check accessibility;
- Microphones/audio-video equipment;
- Lights/air conditioning/heating;
- Bending straws;
- Sensitivity of hotel staff/volunteers/drivers;
- Room size and set up;
- Meals/special diets;
- Refreshments/breaks; and
- Social activities/transportation.

**6. Other:**

- Resource for assignments between sessions;
- Medical care/nurse;
- Seek other funding;
- Be creative/flexible;
- Plan for everything that will go wrong; and
- Listen to participants.

**Sources of Funding**

Most Partners programs begin with Council funds. The ongoing funding for Partners must come from other sources. The participants generated over 20 different sources of support as listed below:

1. In-kind contributions from Council staff and other state agency staff to serve as facilitators.
2. Title V—Maternal/Child Health funding.
3. Community Reinvestment Act—go to banks and investigate this funding source.
4. Solicit individual scholarships connected to people with disabilities.
5. Access existing training monies.
6. Access Independent Living Funds.



7. Graduates solicit scholarship money for next Partners group.
8. Line item budgets in existing programs.
9. National advocacy groups should contribute because graduates can enter these organizations.
10. Shared costs for national speakers with Department of Education.
11. Access corporations already familiar with developmental disabilities issues.
12. State/local corporation (Coca Cola/professional baseball teams).
13. Use other money in low proportion to keep integrity of Partners.
14. Utilize churches.
15. Foreign investments.
16. Solicit friends/acquaintances who knew graduates before and after.
17. Private pay/sliding fee scale/matching funds.
18. Indian Health Services.
19. In-kind contributions from national hotels and airlines.
20. State Protection and Advocacy.
21. Long-term commitment--three years or more.
22. Use evaluation data to ensure funding; use Partners graduates from other states.
23. Secure an accounting firm (pro bono) to handle financial logistics.

### **WHAT HAPPENS AFTER GRADUATION?**

Upon graduation, the Partners often ask for reunions and a method of staying connected. All participants brainstormed possible postgraduation activities:

1. Sponsor an Organization Fair so Partners can join other groups.

2. Sponsor a reunion via teleconferencing.
3. Self-advocate support through Partners connections.
4. Career change support via scholarships.
5. Create a phonetree to avoid long distance charges.
6. National Partners Pen Pals. Match up at National Academy
7. Create a national directory of Partners graduates.
8. Visit Partners who are jailed because they demonstrated, provide bail money!
9. One-day regional conference; graduates are guest speakers at new states.
10. Ongoing financial support for Partner advocacy efforts/system change.
11. Obtain mini-grants to assist local problem solving.
12. Connect graduates to other advocacy organizations to assume some overhead (mailings, copies, etc.).
13. National and in-state conference of all graduates.
14. Use graduates as planners, hosts, presenters.
15. Project grants to pay living expenses as graduates pursue projects.
16. Create computer bulletin board.
17. Councils send Partners to other conferences to spread word.
18. Create a national Partners newsletter.
19. Add Partners to DD Council newsletters and other mailings.
20. Share Partners newsletter with all.
21. Start a round robin newsletter (chain letter).

22. Develop a recruitment/funding video, Colleen and Ed should sponsor.
23. Rotate National Academy to other states, especially Hawaii.
24. Partners meeting: Partners bring state officials or local citizens to learn about Partners.
25. Ask graduates what they need
26. Obtain fax machines for each Partner nationwide.
27. Larry Rice will donate first \$5 to Partners.

### **WHAT ELSE DO YOU WANT TO KNOW?**

The final session provided the opportunity for participants to ask any remaining questions. The list of 24 questions and brief answers are provided:

1. Are states doing fun, special, or neat things during sessions?
  - Karate;
  - Team building;
  - Testimonials;
  - Graduation cupcakes/candle ritual;
  - Role playing;
  - Use starfish theme on stationery, all the sessions, and graduation;
  - After-hours bar time;
  - Collaborative groups;
  - Use cooperative learning, present skits.
2. Are prospective states going home with a commitment to Partners?
  - Most states are interested and will be going home to try to implement.
3. Why dress up for conferences and sessions?
  - It is up to the individual. Some choose to dress up, while others prefer to be casual.
4. What kind of help or technical assistance can we give to each other?
  - The Academy Committee members are listed in the front

of the three-ring binders and are available to assist. Feel free to call each other.

5. How can a person with a disability keep from being treated as second class?
    - Broaden your circle of friends;
    - Be assertive; and
    - Graduate from Partners.
  6. Advice on how to or whether to join leadership training that's already operating yet maintain integrity of Partners:
    - Must be individually negotiated within the state. Partners must maintain its integrity.
  7. Cost per person--United States National:
    - Depends on in-kind match; and
    - \$2,000-\$3,000-\$4,000 range per year.
  8. Can we get copies of grants to submit?
    - Call the existing states if you want copies of proposal.
  9. Action Plan--What does each state plan to do when they go home?
    - Create your own state action plan.
  10. How will this program lead to leadership?
    - Provides knowledge, skills, and how-tos; and
    - Role playing, skits, homework, and human element provide leadership opportunities.
  11. What is the minimum time to go through program effectively?
    - Must cover competencies and topics; and
    - Must allow time for individual support and bonding.
- Note:** Original model--8 sessions over 1-year period.
12. How do we verify that Partners replication will really meet the definition of Partners?
    - We must verify;
    - There must be values;
    - Keep honest; and

- Test programs against existing data and evaluation.
13. What to do if a Partner doesn't share the vision?
    - Get on common ground; and
    - Negotiate, argue, and confront each other; hash out values.
  14. Civil disobedience training?
    - Not provided. Community organizing training is provided.
  15. Couples in program?
    - Have husband/wife attend in different years.
  16. Nuts and bolts--timelines, administration--how-tos?
    - Read the three-ring binder. Call for technical assistance.
  17. How to reach unserved people with limited communication skills/illiteracy?
    - See suggestions above for individual supports; and
    - See three-ring binder.
  18. Who selects day(s)/places/times, staff, or participants?
    - Usually set in advance by the funding agency/coordinator.
  19. Homework examples?
    - See three-ring binder.
  20. List of competencies?
    - See three-ring binder.
  21. Mentoring across states to get started?
    - Call each other.
  22. How to sell "new" concept to advocacy groups while showing respect to past contributions?
    - There must be respectful interchange between families of adults and families of small children.
  23. Should older parents and geriatric consumer participate in Partners?
    - Create vision for future, not redress the past problems.

**24. How to give information to new Partners prior to beginning?**

- **Use the letters, brochures, and testimonials.**

**A separate product will be created by the sponsors during 1992 that describes competencies, possible speakers, and readings. Copies will be mailed to state coordinators.**