

**IL-NET**

CIL-NET · SILC-NET

**Leaders Without Limits:  
A Community Leadership Academy  
*Train-the-Trainer***

**September 19-21, 2016**

**Houston, Texas**

***Presenters:***

**Robert Hand**

**Kimberly Tissot**

# Training Page

- <http://www.ilru.org/training/leaders-without-limits-community-leadership-academy-train-trainer>
- Will include PowerPoints, handouts, and on-demand video recordings (once edited and captioned) of this training.

# Program Overview

You will learn. . .

- Characteristics of effective community leaders, including CIL and SILC boards.
- A framework and requisite skills for building capable community leaders that will take active leadership roles on boards, commissions, and councils within their communities.
- Benefits and advantages of implementing a Community Leadership Academy within a CIL.
- Steps to implement a Community Leadership Academy within a CIL.

# Community Leadership Academy Basics

# How It All Started

- About 6 years ago the board of directors of Resources for Independence Central Valley (RICV) set the goal that, “people with disabilities will be full participants in our communities.”
- They were making the point that they wanted to go beyond just making specific buildings or services accessible.

# Lack of Representation

- When we looked at our communities, we found that community leaders made decisions without access or independent living philosophy in mind.

## Current Scenario:

- About 57 million of 324 million residents of USA have reported they have some type of disability.
- Less than half of one percent of government leadership roles are people with disabilities.

# Finding a Solution

- To change this situation locally, we decided to help people with disabilities get positions on nonprofit boards of directors and government councils. These are the easiest ways to start people into community leadership roles.
- We asked constituents to let us help them get appointments, but most of them didn't feel confident enough to be on those boards or councils.

# The first Community Leadership Academy (CLA)



- To prepare people to represent their communities, RICV started the first Community Leadership Academy (CLA).
- CLA is a leadership program to develop and encourage persons with disabilities to become community leaders.
- CLA teaches parliamentary procedures, leadership skills, open meeting laws, various leadership skills, and much more.

# Leaders Without Limits

- The CLA was so successful for RICV that we were asked to design a program to teach other independent living centers how to start their own academies. This train-the-trainer program is called Leaders Without Limits.
- This program will give you the knowledge and tools needed to start your own Community Leadership Academy. Among the most important tools are the trainer's manual and the student workbooks.

# The Trainer's Manual

- ILRU has provided a trainer's manual for each of you. The manual has nine sections and two appendixes.
- We will be covering all of the topics in the manual, but not in the exact order they appear, and not by discussing each page. As we cover each topic, feel free to look at the manual and ask questions if we haven't made any part of it understandable for you.

# Starting a CLA

Running a Leadership Academy at your center will:

- Improve the knowledge and skill level of your board members.
- Greatly improve your ability to recruit board members with disabilities who know how to be effective on a board.
- Enhance your center's reputation in your community as an organization that develops community leaders.

## Starting a CLA, cont'd.

- Make your community a better place for people with disabilities because more of the decisions that affect their lives will be made with accessibility and IL Philosophy included in the decision-making process.
- This includes all types of nonprofit boards of directors and government boards, commissions and councils.

# Designing your CLA

- The Leadership Academy is designed to run from 15 – 18 hours; they are typically presented once a week in 3 hour increments for 5 to 6 weeks.
- You can use any design that works for your center; two 8 hour days, 5 days in one week for about 3 hours/day, or any other design.
- We will discuss other aspects of running a CLA over the next few days. One thing to keep in mind is that we recommend that you bring in an outside speaker for each session. This provides extra expertise and more variety to each presentation.

## Able SC's CLA

- Able SC received the Leaders Without Limits training in August of 2014.
- Able SC's First Community Leadership Academy started February 2015.
- We are now on the 7<sup>th</sup> Community Leadership Academy and have had over 40 CLA Graduates. We have 26 CLA Graduates in leadership positions in 62 positions in 45 unique groups.

# Steps Able SC Took to Start a CLA

- Secured Funding
- Created an Academy Schedule
- Staffing—Skills needed
  - Parliamentary Procedures
  - Understanding of Government and Organizational Structures
  - Experience Serving on a Board
  - Recruitment/Outreach
  - Event Planning
  - Experience with Facilitating Trainings



## Able SC's CLA Video

- This video was created as a promotional/recruitment video for the program. It was sent on USB drives to state agencies, Chambers, and nonprofit associations and foundations. The video is also housed on our website.

Able SC's Video:

<https://www.youtube.com/watch?v=33C1uLDSUUc>

# Leadership in the Community

# What a Trainer Does

Leadership in the Community – Section 4, pages 27-41

Purpose:

- This lesson will introduce participants to the academy and empower them to better understand the concept of leadership.

As a trainer, you will:

- Cover course overview and objectives.
- Get to know participants with an ice breaker.

## What a Trainer Does, cont'd.

- Help participants determine individual leadership styles.
- Cover legal and ethical responsibilities.
- Coordinate a guest speaker: "Applying Life Experiences to Leadership."

# Two Types of Leadership

- The CLA is designed to help individuals advance their skills as both appointed authority figures and natural leaders (pages 33 & 34).
- Natural Leader: “Natural” leadership traits will not necessarily be taught in the Community Leadership Academy, however trainers must ensure they realize, encourage, and foster these traits in participants.
- Appointed Authority: Board members who are appointed with the responsibility of developing policy and providing a specific level of governance in the organization they serve.

# Impact of Having a CLA at Able SC

- Outside Speakers/Community Members are now committed to our organization and CLA (speakers include State/County representatives).
- Community members have a better understanding of the importance of including people with disabilities (IL Philosophy!)
- Able SC gained staff via CLA Graduates.
- Recruited trained board/SILC members.
- Funding opportunities.

# Leadership Styles

- Discuss general leadership styles and the importance of working well with others (Pages 36 & 37).
- We don't emphasize any professionally developed assessment of leadership styles, but we do offer some examples of self-assessments (see handouts).
- The discussion is more around how each individual goes about being a leader in a group dynamic.

# Functions of a Nonprofit Board, Part I

# Board Ethical Responsibilities

This session introduces the concepts of legal and ethical responsibilities of board members. The discussion of ethical responsibilities starts with the outline below (pages 39 & 40)

- Three basic ethical responsibilities.
- Duty of Care – Attentive to the board.
- Duty of Loyalty – Ensure actions are in the interest of the board served.
- Duty of Obedience – Act in a way that is consistent with agency mission and goals.

# Board Legal Responsibilities

- Legal issues are covered in Appendix 2B, pages 145 & 146.
- Board is protected
  - By being a corporation
  - Under the Good Samaritan Laws
- However, there is no protection for
  - Malfeasance
  - Neglect

# Conflict of Interest

- Personal gain from a decision made by the board
- Conflict arises not from the opportunity to gain, but when the member does not acknowledge the conflict and abstain from voting, or when given advantages not offered to the public (e.g. not required to bid on a contract)
- Both an actual conflict and the appearance of a conflict are important
- Consumers on a board may have a conflict if the board is making decisions about services they receive

# Documents to Protect a Center

- Conflict of Interest Statement
- Non-Disclosure Statement or Confidentiality agreement
- Restricts the release of specific information
- Can be legally binding

# Nonprofit Boards

- Functions of a Nonprofit Board, Section 5, pages 43–69
- Purpose:  
This lesson will enable the participants to understand the working of a nonprofit board of directors and how they can participate as a board member themselves.

# Roles of Board Officers

Definitions on Appendix 2G on page 174

- Chair
- Vice-Chair
- Secretary
- Treasurer
- Immediate Past Chair
- Chair Elect
- Parliamentarian

# Experiences of Having a CLA

\* Bob, Kimberly and Paula discuss good and bad experiences.

# Lunch

## CLA Panel

# Functions of a Nonprofit Board, Part II

# Nonprofit Boards, cont'd.

As a trainer, you will cover:

- Basic nonprofit definitions
- Articles of Incorporation & Bylaws
- Board Officers and Committee Chairs
- Robert's Rules of Order (Parliamentary procedure)
- How most boards operate
- Nonprofit Finances

# Incorporation

- Nonprofits are incorporated in a specific state.  
(Pages 45-49, Appendix 2E)
- The Articles of Incorporation are fairly general with broad outlines about the organization.
- Nonprofits can be membership or non-membership corporations.

# By-Laws

- Bylaws give more definition about the operation of the corporation (Appendix 2F).
- They cover membership rights (if any), board make-up and elections, officers, committees, quorums, and more.
- They should state important details, but not be more specific than necessary (i.e., there will be an annual meeting, but not the day it will occur).

# How Boards Operate

## Board operations (pages 57-63)

- Only boards have authority, not individual board members or officers, unless given authority by the board or in the by-laws.
- Boards are decision-making bodies. Their activities should be focused on the decisions they need to make.
- Boards usually take input from the public, but only the board participates in discussions and actions on topics.

# Parliamentary Procedures

Parliamentary procedures (Appendix 2H, handouts on parliamentary procedures)

What is Robert's Rules of Order?

- The idea is to bring order and structure to the decision-making process, allowing for more work to be accomplished in less time. This is often accomplished through various modifications of Robert's Rules of Order.
- The CLA teaches Robert's Rules of Order, and how boards actually operate.

# Running a Meeting

The CLA teaches

- The role of the chair/president
- Making a motion and second
- Amendments, friendly amendments and regular amendments
- Calling the question
- Tabling a motion
- Point of order
- Other procedures

# The Chairperson

- Chairperson and President are interchangeable for most nonprofits.
- The Chairperson is an active position, not a passive one.
- She must be a non-biased facilitator.
- We recommend that she not make motions, seconds or vote (except in a tie).
- The Chair must guide, but not dictate.

# Parliamentary Procedures, cont'd.

## Motions and seconds

- Discussion before and after a motion

## Amendments

- Most organizations use friendly amendments.
- What is a friendly amendment – it isn't about being friendly.
- Procedure when it is not a friendly amendment.

## Parliamentary Procedures, cont'd. 2

- Calling the question – ending debate, voting process
- Tabling a motion – say when and why, usually done by consent
- Point of order – right of every board member
- Other procedures – rarely used (suspending the rules, point of privilege)

# Teaching about Financial Statements & Budgets



Appendix 2I & 2J (Pages 177-180)

- Show examples of your CIL's/SILC's budget.
- Create sample budgets.
- Teach about important questions to ask or how to look for concerning line items.
- Accommodations budgeted? At Able SC, we teach CLA participants to bring their disability voice to the table and make sure the Boards/Committees/Councils are fully prepared to comply with the Americans with Disabilities Act.

# Group Discussion

# Board Exercise

# Wrap Up Day 1

- Wrap Up
- Q&A

# Day 2

## September 20, 2016

# Q & A From Day 1

# Government Councils and Commissions

# Government Councils & Commissions

One of the purposes of CLA is to get graduates connected with Government Councils and Commissions.

- Explore the interests of the CLA Participants. Are they interested in healthcare, disability, environment, social, equality, animals, etc.?
- Help make connections.
- Our voices are powerful on nontraditional boards/committees/councils.
- But make connections with councils that require people with disabilities to serve as well (P&As, DDCs, CILs/SILCs, etc.)

## Examples of Boards/Councils/Committees

- State's Parent Training and Information Center (PTI) Board of Directors
- State Alliance for Adolescent Sexual Health (SAASH) Board of Directors
- SCDHHS' HCBS Person Centered Planning Workgroup
- Title One Representative – Horry County Schools
- SC School of Medicine's Advisory Board of Directors
- United Way Board of Directors
- Newberry County Young Professionals Board of Directors
- South Carolina Developmental Disabilities Council

# Open Meeting Laws

Open meeting laws – Sunshine laws (page 75)

- They can be very different in each state.
- Some are very strict, some much more lenient.
- In some states they apply only to government entities, in some they apply to any group that gets state grants.

## Open Meeting Laws, cont'd.

Research the laws in your state

- Teach the details of how the laws apply in your state.
- If you have access to an attorney or government representative, they can cover this.

# Being on a Government Council

- You become like a government employee.
- You must be loyal to that government and its leaders.
- There may be strict conflict-of-interest regulations.
- Resign from the council if you have strong disagreements; then you are free to criticize them.

# Community Interactions

# Community Interactions

CLA Participants are taught how to effectively interact as a leader.

- Soft Skills and responsibilities (pages 78-85, Appendix 2K)
  - Time Management
  - Attitude
  - Critical Thinking and Problem Solving
  - Effective Communication
  - Body Language
  - Active Listening
  - Managing Emotions
  - Handling Conflict

# CLA = Community Inclusion

- Importance of Community Inclusion regarding:
  - Speakers/CLA Participants
  - Interests
  - Communities
  - Racial/Ethnic
  - Disability
  - Gender
  - Sexual Orientation
  - Age

**A good board wants diversity!**

# Acquiring Speakers/Funders

- Invite funders/speakers to the table.
- Approach your DD Council, Nonprofit Associations, local United Ways and Foundations, Universities, local/state government entities, etc.
- Include this program in grants/budgets. A lot of grants require advisory councils.
- Outreach– Invite community leaders to graduation and go out and “sell” the benefits of this program.

# Speakers/Funders Recruitment

Speakers, funding, recruitment (pages 12-23, Appendixes 1B & 1E)

- The sessions are designed to have speakers on each topic.
- Outside speakers bring another level of expertise, a new perspective on topics, and greater variety to the presentations.
- They also provide another way to introduce your consumers to important community contacts.

## Speakers, cont'd.

Some examples:

- Community Leadership – persons with disabilities who have several years of experience in meaningful leadership roles.
- Nonprofits and boards of directors – executive directors of nonprofits, officers of nonprofit boards.
- Board procedures – persons with experience on boards who know parliamentary procedures, nonprofit management consultants.

## Speakers, cont'd. 2

- Finances – accountants who know nonprofit finances, fiscal staff from a nonprofit, executives familiar with financial reports.
- Government councils – elected officials or their staff, government ADA Coordinators if they have an advisory committee.
- Past CLA Graduates to share how they used their CLA experience to serve.

# Funding a CLA

One course should cost between \$25 and \$60/person;  
so 15 participants would cost \$375 to \$900.

Potential funders include:

- Foundations that support community involvement
- Corporations, local businesses, government officials  
(Such as DD Councils)
- Universities
- Sponsorships by civic clubs
- Individual fees

**Get creative—include CLA when writing grants**

# Group Discussion

# Lunch Topic: Experiences on Boards and Councils

## **CLA Exercise**

# **Developing Collaborators in the Community**

# Graduation Planning

# Recruitment

- The first class is particularly important because the community will look at what the graduates do.
- Choose people whom you can recommend for leadership roles.
- Look for people with disabilities who are active in your community; diversity is essential to get a wide variety of experiences.
- Recruit from community colleges and universities.

# CLA Graduation Planning

Page 102

## **This is a big deal!**

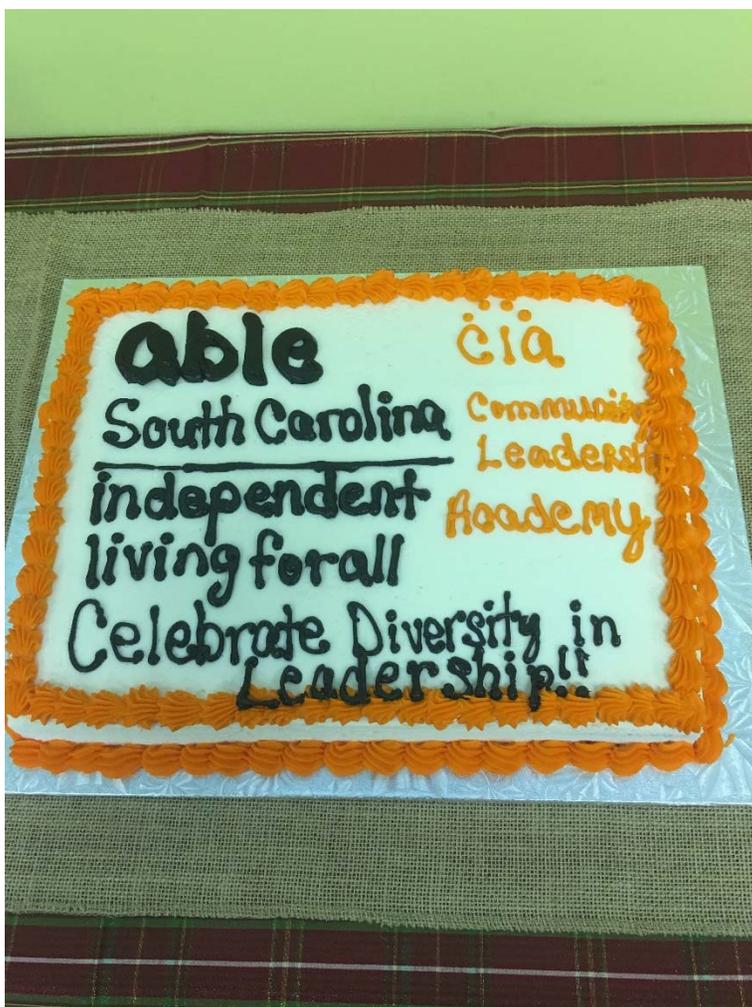
- Prepare program. (opening, middle, closing)
- Able SC has graduates prepare a few minutes to speak (elevator speech).
- Provide Certificates. (Example on 1F, Page 126)
- Send Invitations (Mail/Email)–Invite community members and encourage them to bring information about their agencies (i.e., brochures, board applications, etc.)
- Design the graduation as a “mixer”– this is where CLA graduates should be networking.

# Reach out to the Community for In-Kind Donations

- Grocery Stores
- Local Restaurants
- Bakeries
- Party Supply Stores
- Printers

**Make Sure to recognize your donors!**

# CLA Graduation Photos



# CLA Graduation Photos, cont'd.



# CLA Graduation Photos, cont'd. 2



# Tracking Graduates

# Tracking Graduates

## Appendix 1G (Page 127)

- Tracking graduates will help give your program validity and is a good way to evaluate your program and/or provide further assistance to the CLA Graduate.
- Follow-up with consumers 3, 6 and 12 months after the Academy.
- Inform CLA graduates about the follow-up interviews.

# Tracking Graduates, cont'd.

- Create a CLA Alumni association or network. Give this task to a CLA Graduate!
- Get creative with tracking graduates.
- Examples of Able SC's tracking.

# **Group Discussion**

## **Making Good Placements**

## Wrap Up Day 2

- Wrap Up
- Q&A

# Day 3

## September 22, 2016

# Q & A From Day 2

## Summary of Starting a CLA

- Discussion of how to proceed and other independent living centers that have been successful

# CLA Exercise

## Planning *YOUR* CLA

# Individual Planning for Next Steps

- See planning tool handout.

# Wrap Up and Evaluation

- Wrap Up
- Complete evaluation of training

# For more information

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# CIL-NET Attribution

Support for development of this training was provided by the Department of Health and Human Services, Administration for Community Living under grant number 90TT0001-02-00. No official endorsement of the Department of Health and Human Services should be inferred. Permission is granted for duplication of any portion of this information, providing that the following credit is given to the project: Developed as part of the IL-NET, an ILRU/NCIL/APRIL National Training and Technical Assistance Program.