



**SELF-ADVOCATES ADVISORY COMMITTEE MEETING
NOTICE /AGENDA**

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PARTICIPANT CODE:	2982825

DATE: Tuesday, July 14, 2015
TIME: 9:00 a.m. – 12:00 p.m.
LOCATION: Hilton Arden West
2200 Harvard Street,
Sacramento, CA 95815
Phone: (916) 922-4700

Pursuant to Government code Sections 11123.1 and 11125(f), individuals with disabilities who require accessible alternative formats of the agenda and related meeting materials and/or auxiliary aids/services to participate in this meeting should contact Thomas Johnson at (916) 322-8481 or email thomas.johnson@scdd.ca.gov. Requests must be received by 5:00 pm, July 7, 2015.

Page

- | | |
|-----------------------------------|--------------------|
| 1. CALL TO ORDER | D. FORDERER |
| 2. ESTABLISHMENT OF QUORUM | D. FORDERER |
| 3. WELCOME/INTRODUCTIONS | D. FORDERER |
| 4. PUBLIC COMMENTS | D. FORDERER |

*This item is for members of the public only to provide comments and/or present information to the Council on matters **not** on the agenda. Each person will be afforded up to three minutes to speak. Written requests, if any, will be considered first. The Council will provide a public comment period, not to exceed a total of seven minutes, for public comment prior to action on each agenda item.*

For additional information regarding this agenda, please contact Robin Maitino, 1507 21st Street, Ste. 210, Sacramento, CA 95811, (916) 322-8481. Documents for an agenda item should be turned into SCDD no later than 12:00 p.m. the day before the meeting to give members time to review the material. The fax number is (916) 443-4957.

5. **APPROVAL OF May 19, 2015
MEETING MINUTES** **D. FORDERER**
6. **SSAN (Statewide Self-Advocacy Network)
REPORT** **D. FORDERER/
C. HORNE-NUTT**
7. **REPORT ON EMPLOYMENT FIRST
COMMITTEE (EFC) MEETING** **K. WELLER**
8. **CECY REPORT** **S. KAPP**
9. **DISCUSSION ON RESEARCH
MATERIALS FOUND** **ALL**
 - Abuse
 - Deinstitutionalization
 - Disability awareness
10. **FACILITATION MANUAL INPUT** **S. MAY**
11. **TAX CREDITS FOR WORKING POOR** **B. GIOVATI**
12. **REVIEW COUNCIL PACKET** **A. CARRUTHERS**
13. **TOPICS FOR FUTURE DISCUSSION** **D. FORDERER**
14. **CLOSED SESSION** **N. BOCANEGRA**
15. **ADJOURNMENT** **D. FORDERER**



DRAFT

**SELF-ADVOCATES ADVISORY COMMITTEE MEETING MINUTES
May 19, 2015**

Members Present

David Forderer (Chair, SA)
Jenny Yang (SA)
Robert Taylor (SA)
Nancy Clyde (SA)
Kerstin Williams (SA)
Rebecca Donabed (SA)
Charles Horne-Nutt (SA)
Kecia Weller (SA)
Jay Lytton (SA)
Sandra Aldana (SA)

Members Absent

Steven Kapp (SA)

Others Attending

Aaron Carruthers
Mary Agnes Nolan
Angela Lewis
Wayne Glusker
April Lopez
Thomas Johnson
Denyse Curtright
Carolyn Meshack
Sabrina Smith

1. CALL TO ORDER

Chairperson David Forderer called the meeting to order at 1:13 p.m.

2. ESTABLISHMENT OF QUORUM

A quorum was established.

3. WELCOME AND INTRODUCTIONS

Everyone present introduced themselves.

4. PUBLIC COMMENT

Denyse Curtright, with the Department of Developmental Services, provided members with a flyer and invited them to provide their input to their committee that is working on Competitive Integrated Employment (CIE): Blueprint for Reform effort. Chairperson David Forderer requested council staff to invite Denyse Curtright back to the SAAC when there is more time on the agenda to discuss this important issue. Members were asked to email CaliforniaCIE@dor.ca.gov to provide input.

To watch progress on the CIE, members can refer to this webpage:
[http://www.chhs.ca.gov/Pages/Competitive-Integrated-Employment-\(CIE\).aspx/](http://www.chhs.ca.gov/Pages/Competitive-Integrated-Employment-(CIE).aspx/)

5. APPROVAL OF January 21, 2015 MINUTES

It was moved/seconded (Horne-Nutt/Clyde) and carried to approve the March 24, 2015 SAAC meeting minutes as presented. Council members Jenny Yang (SA), Nancy Clyde (SA), Kerstin Williams (SA), David Forderer (SA), Robert Taylor (SA), Rebecca Donabed (SA), and Charles Horne-Nutt (SA) voted 'Aye'. There were no "nays". Councilmembers Jay Lytton (SA), Kecia Weller (SA), and Sandra Aldana (SA) 'abstained'.

6. SSAN (STATEWIDE SELF-ADVOCACY NETWORK) REPORT

Chairperson David Forderer (SA) provided members with a report on the Supported Life Self Advocacy conference that he and councilmember Charles Horne-Nutt (SA) attended on May 1-2, 2015. Both members presented on Self Determination.

7. EFC REPORT

Councilmember Kecia Weller (SA) provided members with a report on the Employment First Committee that occurred on April 14, 2015.

8. CECY CONSORTIUM FOR YOUTH REPORT:

On behalf of councilmember Steven Kapp (SA), councilmember Charles Horne-Nutt presented the CECY report to the committee. Members then had a very brief discussion of the report that can be accessed on Pages 13 through 15 at the following hyperlink:

<http://scdd.ca.gov/res/docs/pdf/SAAC/2015/2015%20SAAC%20Packet%20may.pdf>

9. DISCUSSION ON RESEARCH MATERIALS

Councilmembers watched a video about the history and legacy of the disability rights movement in the United States. This video can be accessed at the following hyperlink:

<http://www.pbs.org/independentlens/lives-worth-living/>

10. PACIFIC ALLIANCE ON DISABILITY SELF-ADVOCACY

Mary Agnes Nolan briefly presented on the Pacific Alliance on Disability Self-Advocacy [PADSA] and provided additional materials that were not included in the packet. She informed the committee that the Statewide Self Advocacy Network [SSAN] was invited to participate with the PADSA because they are a statewide self advocacy organization/network. Ms. Nolan explained that SAAC was not invited to participate because they are not a statewide organization. All self advocates, including SAAC members are welcome to participate in the training webinars presented by PADSA. The flyer for this organization can be accessed on page 16 through 17 at the following hyperlink:

<http://scdd.ca.gov/res/docs/pdf/SAAC/2015/2015%20SAAC%20Packet%20may.pdf>

11. REVIEW OF COUNCIL PACKET

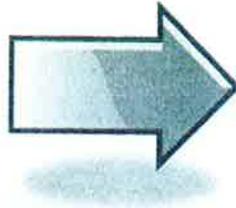
Acting Executive Director Aaron Carruthers reviewed the Council Packet with committee members.

12. TOPICS FOR FUTURE DISCUSSION

Councilmember Robert Taylor (SA) mentioned that the committee should look into the governor's tax proposal for the working poor. Finally, Councilmember Nancy Clyde (SA) mentioned that the committee should look at how the state handles outpatient care, specifically prescription medications.

13. ADJOURNMENT

The meeting was adjourned at 4:45 p.m.



Report from SSAN Meeting TO SCDD
by Charles Horne-Nutt for David Forderer
Highlights from the June 24-25, 2015 SSAN Meeting in Sacramento

- Charles Horne-Nutt presented David Forderer's Council report at the SSAN meeting.
- Regina Woodliff was selected as the new SSAN Vice-Chair.
- Members provided a member report on their advocacy work since the last meeting.
- SSAN workgroups met and developed goals and objectives for the rest of the year. The purpose of each group is:
 - Employment: To educate people with disabilities about their rights for employment.
 - Legislative: Inform and educate our communities on statewide legislation that SCDD has taken a position on.
 - Newsletter: Communicate what SSAN is about so members can take information back to community to help self-advocates.
 - Self Determination: Reach out to other regions to find out what works and what does not!

- Members received a power point presentation on an overview of the Federal DD Act and Lanterman Act; a description of the federal partners and the Councils unique role; and the SCDD State Plan by the acting SCDD Executive Director, Aaron Carruthers
- Kecia Weller presented her report about the April 2015 SCDD EFC meeting.
- Bob Giovati, SCDD Deputy Director of Policy and Planning, presented a legislative update with information on the bills that were approved at the May 20, 2015 Council meeting.
- Robert Balderama, SSAN Member from the North Valley Hills office provided a presentation/training with handouts and a DVD on how the Self Advocacy Council 6 got started.
- Members worked on the first draft of the MOU.
- The next SSAN meeting is on September 23-24, 2015 in Sacramento.

CECY Report for July 2015 SCDD meeting

CECY is making progress on building out its materials housed on the Council's website. Currently only the Data Dashboard is up and running, which again is a partnership between CECY and the Council that shows data related to Employment First. The Data Dashboard plans to add stories of success that highlight best practices CECY has identified, and other areas of the website may be developed as well.

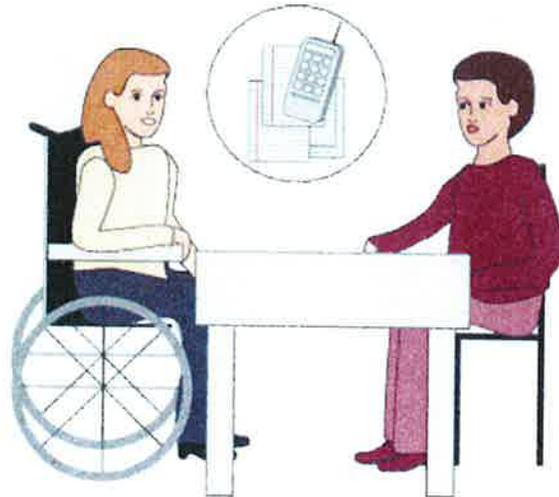
Now CECY would like the Council's – and anyone's! – input on how to make the Data Dashboard more accessible to people, especially people with developmental disabilities and their families. They have questions in three areas:

- (1) Is the dashboard understandable for you? If not, what is not understandable?
- (2) Which parts of the dashboard are meaningful or of interest for you? Which parts are not?
- (3) Are there other things you would like displayed?

The Data Dashboard is available at http://www.scdd.ca.gov/employment_data_dashboard.htm. As you will see, this links to the main page, which provides links to more information on subtopics. CECY is interested in people's reactions to both the front and back pages. The dashboard has been updated recently and later this summer will be adding a function to give a definition to terms by hovering over them with the cursor.

Thank you for your attention as always.

FACILITATION



PURPOSE – PLANNING – PRACTICE

The State Council on Developmental Disabilities gratefully acknowledges the assistance and feedback provided by many self-advocates who have served on governance boards, councils or advisory committees and support persons who have provided facilitation services.

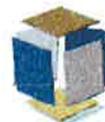
We would like to extend special thanks to the Department of Developmental Services Consumer Advisory Committee and the State Council on Developmental Disabilities Self-Advocate Advisory Committee.

State Council on Developmental Disabilities



Scan the code with your phone to connect directly to the SCDD website, or go to <http://www.scdd.ca.gov>

Prepared by



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Facilitation and advocacy publications
<http://brcenter.org/library>

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From the Executive Director

The disability rights movement has demonstrated that individuals with diverse abilities can play an active and principal role in shaping public policy when provided with suitable support. However, it has often been difficult to provide appropriate assistance or accommodations to achieve this goal.

This guidebook was developed to emphasize a commitment to providing customized supports that promote inclusion and sustain meaningful participation in advocacy and governance groups. This assistance should be viewed as an investment in successful organizational outcomes by expanding the diversity of voices. It is strongly believed that increasing access to fuller participation for some, enriches opportunities for all.

The purpose of *Facilitation: Purpose – Planning – Practice* is to underscore the State Council's commitment to self and peer-advocate engagement in policy-making by providing a framework for councils, boards or committees who utilize meeting facilitators or mentors. This guide provides background and planning tools that lead to more effective accommodation for individual members as they carry out their responsibilities before, during and after meetings.

The guide draws from strategies developed by self-advocacy groups, tested facilitation practices and published resource materials.



Carol Risley
Executive Director
California State Council on Developmental Disabilities

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Supporting people on advisory and policymaking boards of directors, committees and councils

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What Is Facilitation?

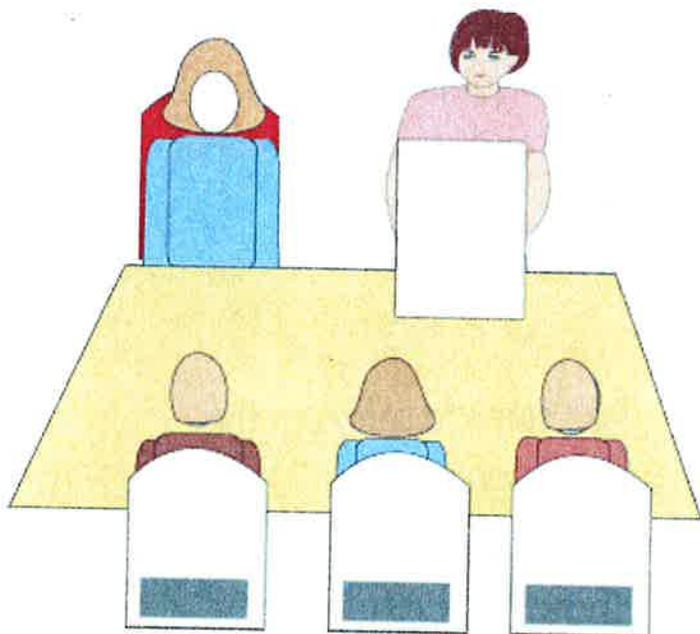
Facilitators provide personalized support to persons with diverse abilities serving on boards and committees.

Increased diversity is one of the greatest changes happening across society today. Many organizations are examining their policies and practices to address opportunities offered by the range of differences that make up their communities, such as race, ethnicity, gender, age, disability, family structure and more.

With the success of consumer and disability rights movements came service models that focus on the individual, with basic rights to speak and be heard. As a result, persons with varied abilities have joined advocacy groups, advisory committees or governing bodies that oversee services and supports. As organizations recognize the importance of including community members who use their services, it is clear that support in this leadership role is an essential accommodation.

As boards, committees or councils welcome diverse participation, it may be difficult for them to provide satisfactory support that allows all members to be heard.

Borrowing from other human service fields and the business community where a “facilitator” assists employees or small groups to find success, individualized support for board, committee or council members has come to be called “facilitation.”



Think – Plan – Do

To ensure participation, meeting organizers, participants and their facilitators need to identify the type of support required by a member, develop a facilitation plan, and carry it out.

Think – Plan – Do, a straightforward process for planning and taking thoughtful steps to achieve success, is a helpful tool for any user. As a basic learning strategy, it can be applied to develop and implement a personalized facilitation plan for any member of a governing board, advisory committee or council.

Think – Plan – Do is easily utilized to identify group member responsibilities and support that will assist with effective participation.



THINK:

What is required to be a successful board, committee or council member?



PLAN:

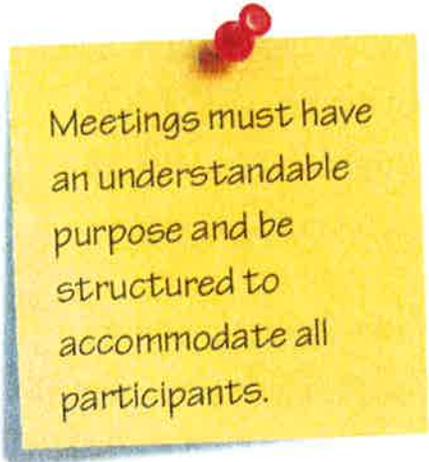
Type of support needed to be an active and effective member.



DO:

Take steps to carry out the facilitation plan.

Accessible Meetings



Meetings must have an understandable purpose and be structured to accommodate all participants.

Because boards of directors, committees and councils are structured to accomplish specific purposes, meeting organizers must be clear about the function of their groups. Whether organized to provide advice, deliver recommendations or take action, member responsibilities should also be clear for successful participation.

It is important that organizational leaders create ground rules for group process that include and support all meeting members. Typically, participants are expected to follow basic meeting rules that direct interactions and fulfill the purpose of the meeting. While helpful, these do not alone guarantee that meetings are accessible to individuals with diverse abilities.

“Facilitation is a functional equivalent of a wheelchair, personal attendant, communications computer, or ramp.”

1989 (Capitol People First)

Meeting organization and practices should be designed to ensure that all participants have equal access to information, opportunity to participate, and responsibility to carry out duties.

Accessible Meetings

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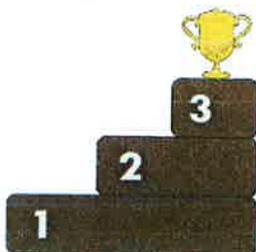
Think:

Do our meetings accommodate members' needs?



Plan:

Restructure meeting schedules, processes and practices to better include all members.



Do:

Gather input from members and carry out restructuring.

Group Facilitation



Accommodating
all members is
key to effective
participation by all.

Member participation is affected by both the meeting leader's style and the process. Traditional meeting procedures and communication methods may need to change to hear contributions from all members. Leaders may need more open approaches, or provide more time for discussion and interactions among group members.

Inclusive practices by meeting leaders to ensure participation:

- ✓ Direct a reasonable pace and adequate time for meeting business.
- ✓ Check-in with members for general understanding by all group members.
- ✓ Provide multimedia presentation of topics. Provide practical examples.
- ✓ Summarize significant points, positions, actions.
- ✓ Monitor group discussion so all members have opportunities to contribute.
- ✓ Use plain language to ensure better understanding.
- ✓ Rely less on traditional meeting format, modify schedules, rules.
- ✓ Be observant! Check in with members to see if a break is needed.
- ✓ Provide time for interactions between meeting members.

Finding Support



A mentor is a guide or coach to help navigate the meeting.

Organizations reinforce inclusive practices by using meeting mentors. Experienced members volunteer to provide support to new participants who may require assistance to be successful.

Mentoring is a strategy that provides encouragement and instrumental support in “learning the ropes,” and becoming more engaged with the group. Using mentoring as a natural support helps all participants know what is expected of them and their responsibilities as group members.

The mentoring process provides an opportunity of increased communication between members outside of regular meetings. The experienced board member can share ways of adjusting to demands of board participation and help prevent a new member from feeling overwhelmed or isolated.

Mentor strategies may include:

- ✓ Introduce the new member to others and encourage social connections.
- ✓ Familiarize a new member with the organization and its structure.
- ✓ Meet with a new member to review agenda and action items.
- ✓ Review meeting outcomes and follow-up responsibilities after the meetings.
- ✓ Explain background on issues presented at meetings.

Finding Support

For the Person Mentored:

Mentors are interested in every member being successful and a contributor to the meetings and organization. As a natural support, he or she is experienced in areas that a new member may not be. A mentor leads by example to help other members understand the organization and how meetings are conducted. When working with a mentor, keep in mind they are volunteering and are not paid meeting facilitators.

Member Responsibilities when Working with a Mentor:



Think:

What assistance is needed from a mentor to be a successful?



Plan:

Create a plan with a mentor.



Do:

Take steps to accept guidance from the mentor.

Remember to:

- ✓ Follow agreements.
- ✓ Ask questions.
- ✓ Share ideas and concerns.

Member and Mentor Teams:

- ✓ Interview each other to make sure the team wants to work together.
- ✓ Meet on a regular basis and plan how to work together.
- ✓ Encourage social relationships and information-sharing among members.

Facilitation Basics

Facilitation is support that meets the individual needs of a member so he or she can perform the general functions of the board, committee or council position. It includes:

BEFORE

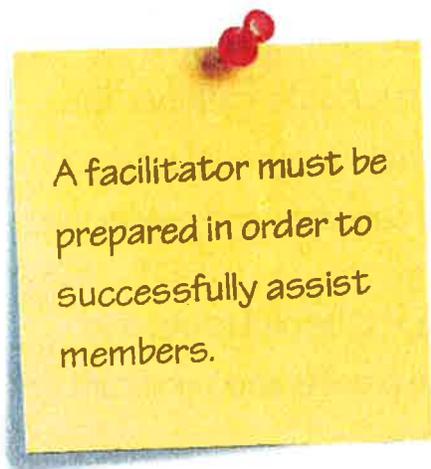
- ✓ Study the meeting materials to provide knowledgeable support.
- ✓ Assist member to prepare by reviewing meeting materials, explaining and adapting materials.
- ✓ Provide impartial analysis of issues, when needed.
- ✓ Help member identify questions and positions on issues that will be brought up at the meeting.

DURING

- ✓ Explain meeting materials and related information.
- ✓ Explain concepts, terms, acronyms, etc.
- ✓ Take notes on key issues, discussions, action items.
- ✓ Provide guidance on meeting process, agenda items and actions.
- ✓ Assist with communicating comments, positions, votes.



Facilitation Basics



AFTER

- ✓ Review notes from meetings.
- ✓ Provide copy of the meeting notes to member in their preferred format.
- ✓ Review actions taken at meetings and important discussions.
- ✓ Assist with related tasks, such as travel arrangements and calendars.
- ✓ Follow-up on assigned duties.



Think:

What is needed before, during and after meetings?



Plan:

Create preparation schedule and agree on facilitation strategies using facilitation worksheets at back of the book.



Do:

Carry out schedule and facilitation support.

Partnerships

Effective facilitators are flexible, willing to learn, and knowledgeable about the organization.

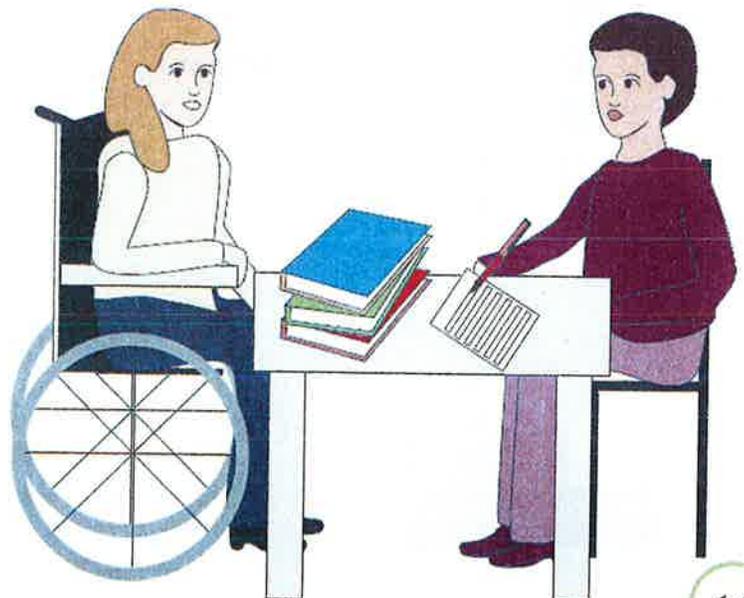
Successful facilitation depends on a respectful partnership between a facilitator and a member. The facilitator extends him or herself by providing support effectively so the member is confident and productive.

Before beginning facilitation, it is helpful to observe a meeting to learn about the process and significant issues facing the organization.

- ✓ Get to know each other's needs, skills, values, preferences.
- ✓ Give and receive constructive help.
- ✓ Give and receive "pats on the back."
- ✓ Preserve privacy.

Facilitation involves assistance the member can understand and learn from, and is always done with a tactful and respectful approach.

Choosing moments carefully during meetings to promote independence is critical for the member to be a connected participant.



Knowledge and Skills



A Facilitator

1. Has knowledge about the organization, type of meetings, role of members (or will obtain).
2. Has knowledge about meeting rules and procedures (or will obtain).
3. Supports member with making "informed decisions."
4. Adapts meeting materials and explains related information.
5. With member, creates strategies for assisting before, during and after meetings.
6. Encourages member inclusion during meetings.
7. Is flexible and adapts to changing needs of member.
8. May act in these roles:

Note Taker—Take notes using accessible plain language the member desires.

Meeting Coach—Guide the member on meeting structure and rules.

Adaptation Specialist—Provide materials the member understands.

Scheduler—Assist the member to maintain meeting calendar.

Researcher—Find information the member may need for meetings.

Code of Ethics

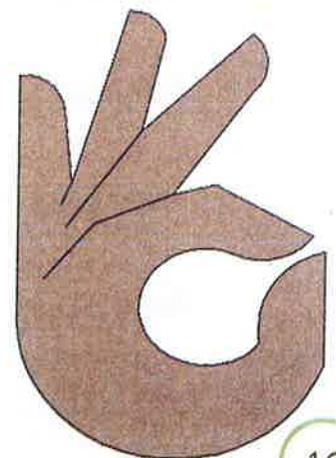
Facilitators support members without influencing them with their own opinions or beliefs.

A productive partnership between the member and facilitator extends mutual respect, trust and dependability. It is important that both facilitator and member observe workplace boundaries so the member contributes and the facilitator performs professionally.

While challenging at times, a facilitator must avoid any influence of their own personal beliefs, opinions or conflicting interests. This requires a facilitator to be self-aware and be a watchful partner, not a self-promoter.

While another party may be a facilitator's "employer of record," the member is a facilitator's "boss" and responsibility to that arrangement must be remembered.

- ✓ Avoid influence on the member's voting and decision making.
- ✓ Avoid speaking up or acting "like a member" at meetings.
- ✓ Recognize you may not always agree, and address in a respectful manner.
- ✓ Acknowledge and address barriers faced in being a facilitator.
- ✓ Do not use the organization or facilitation position for personal advantage.
- ✓ Maintain confidentiality, do nothing to violate the trust.
- ✓ Maintain confidentiality regarding discussion and decisions from "closed" meetings.



Resources

PLAIN LANGUAGE

Center for Plain Language

Nonprofit organization promoting the use of plain language in the public and private sectors. <http://www.centerforplainlanguage.org>

Is it Plain? A Manual for Language Writers (2001). Janet Pringle. Vocational and Rehabilitation Research Institute, 3304 33 Street N.W. Calgary, Alberta T2L 2A6.

Plain Language Action & Information Network

Promotes plain language for all government communications. Strategies to improve communication from the federal government to the public. <http://www.plainlanguage.gov>

ACCESSIBLE MEETINGS

Accommodations and Supports for Including Special Populations in Leadership and Decision Making Activities (2002). NY State Developmental Disabilities Planning Council. http://tcsip.tarjancenter.ucla.edu/docs/AccommodationforSpecial_Populations.pdf

Board Resource Center (BRC) "Making Complex Ideas Simple"

Advocacy publications and media emphasizing strategies that ensure inclusive boards and committees. Focus group developed tools, using graphics and plain language developed for public agencies. Download library available http://brcenter.org/lib_library.html

Developmental Disabilities Planning Council's Promoting Leadership Opportunities Demonstration Project (2002). Esther Kabuga and Cheryl Spear.

Technical Assistance and Resource Center, Center on Human Policy, Syracuse University, 805 South Crouse Syracuse, NY 13244-2340.

Facilitation: A Ramp to Success. Tools to Assist Members with Effective Participation (2006), Supported Life Institute (for Alta California Regional Center). 2035 Hurley Way, Suite 250 Sacramento, CA 95825 (916) 567-1974.

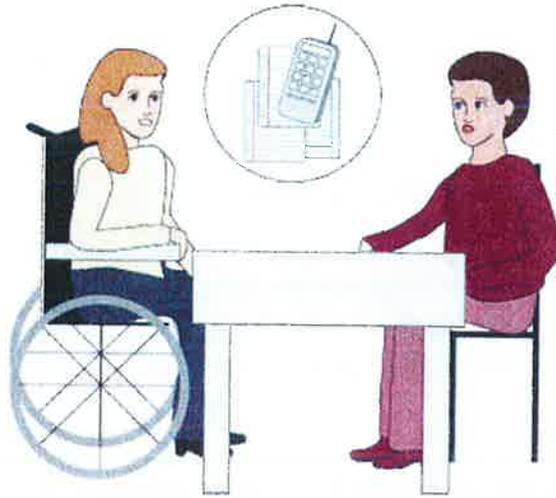
Get on Board and Make a Difference: Effective Practices for Including People with Developmental Disabilities and New Members on Boards and Committees. Green Mountain Self-Advocates and the Arc of Vermont <http://www.ddas.vermont.gov/ddas-publications/publications-dds/publications-dds-documents/dds-publications-advocacy/ddas-advocacy-get-on-board>

The Guide: NASDDDS Handbook on Inclusive Meetings and Presentations (2006). National Association of State Directors of Developmental Disabilities Services. 113 Oronoco Street Alexandria, VA 22314 (703) 683-4202. <http://www.nasddds.org>

Making Meetings Accessible: How to Enable Real Participation. Vermont Division of Disability and Aging. (802) 241-2614.

Not Another Board Meeting: Guides to Building Inclusive Decision-Making Groups (1995). Oregon Developmental Disabilities Council.

FACILITATION



PURPOSE – PLANNING – PRACTICE

Facilitation Plan

All members of boards, committees and councils must be able to participate equally and make informed decisions. It is important that members who need assistance on a board, committee or council be encouraged and made aware that accommodations are available to enhance their participation.

The following worksheets are designed as a self-survey that addresses a range of facilitation support needs to help identify the type and amount of support that may be useful. The worksheets are designed to be completed by the member and facilitator. Discussion by the facilitation partners is an important component of the self-survey. It provides an opportunity to learn how the team will work together and best ways to provide support.

Facilitation Worksheet

Facilitator and Member to complete.

Organization:

1. Does the organization have a job description for facilitators? (If so, review)

2. Can the organization or meeting leader add the facilitator to important mailing lists?

3. What adaptations does the member currently use at work or home?

4. Would these adaptations be useful at meetings? (Which ones)

5. How will personal care needs be met, if required?

6. Is there specific support the member wants? (List)

Facilitation Worksheet

Facilitator and Member to complete.

Personal Needs:

1. Mobility (walking, help with stairs and elevators, transferring in/out of wheelchair, opening doors, etc.)

Support I want:

2. Meeting Site (location, contact information, meeting room, bathroom)

Support I want:

3. Transportation (making arrangements)

Support I want:

4. Hotel Accommodations (accessible room, locating people, meeting room, etc.)

Support I want:

5. Food and Drink (assistance with meals, eating or drinking)

Support I want:

Facilitation Worksheet

Facilitator and Member to complete.

Personal Needs:

6. Medication (reminders to take, and medication effects)

Support I want:

7. Personal Appearance

Grooming

Professional Image

Hygiene

Support I want:

8. Bathroom Assistance (opening doors, transferring, etc.)

Support I want:

9. Transportation (arranging: public, private, special)

Making arrangements _____

Paying for transportation _____

Waiting until ride arrives _____

Support I want:

10. Other:

Support I want:

Facilitation Worksheet

Facilitator and Member to complete.

Member Duty Needs:

1. Understanding organization's structure and process

- How meeting is run, Robert's Rules
- Review by-laws or operating rules
- How members communicate with each other and make decisions
- How the meeting makes decisions

Support I want:

2. Reviewing materials for the meeting

- Minutes
- Agendas
- Action items
- Other materials in packet

Support I want:

3. Speaking up

- Talking about ideas before meetings
- Highlighting main points to talk about
- Preparing statements, reports

Support I want:

Facilitation Worksheet

Facilitator and Member to complete.

Member Duty Needs:

4. Asking questions and making comments

- Writing down questions or comments to bring to meetings
- Making sure my points get across to the group
- Remembering at the meeting:
 - ask my question
 - make my statement

Support I want:

5. General Reminders

- Completing calendars, meeting dates and times
- Making phone calls and writing emails
- Getting information
- Completing assigned work
- Bringing materials to meetings

Support I want:

Facilitation Worksheet

Facilitator and Member to complete.

Member Duty Needs:

6. Making materials understandable

Adaptations:

- | | |
|---|---|
| <input type="checkbox"/> large print | <input type="checkbox"/> pictures and text |
| <input type="checkbox"/> pictures only | <input type="checkbox"/> computer disk |
| <input type="checkbox"/> Braille | <input type="checkbox"/> language translation |
| <input type="checkbox"/> plain language: easy-to-understand words | |

Support I want:

7. Reading materials

- Turning pages, highlighting main points
- Writing summaries
- Reading materials aloud
- Explaining hard-to-understand language
- Explaining acronyms or new terms

Support I want:

8. Taking notes

- Writing down important points, actions, decisions
- Take notes on paper or a computer
- Explaining notes

Support I want:

Facilitation Worksheet

Facilitator and Member to complete.

Professional Needs:

Do you want help with:

YES

NO

UNDERSTANDING HOW THE GROUP WORKS

Ground rules

Voting procedures

Meeting structure

Remembering people and their jobs

Staying on topic

DECIDING WHAT IS MOST IMPORTANT TO DO

Which project to do first

Which projects or committees to join

REVIEWING OR READING MEETING MATERIALS

Minutes

Agendas

Action items

Additional information

Facilitation Worksheet

Facilitator and Member to complete.

Professional Needs:

Do you want help with:

YES

NO

REMEMBERING THINGS

Meeting times

Scheduling the calendar

Making phone calls

Writing letters

Finding information

Completing assigned work

Bringing materials to meetings

COMMUNICATION

Using the phone

Leaving messages

Helping others understand me

Sending or receiving emails

Printing emails

Facilitation Worksheet

Facilitator and Member to complete.

Professional Needs:

Do you want help with:	YES	NO
DOCUMENTS		
Signing documents	<input type="checkbox"/>	<input type="checkbox"/>
Signing my name with permission	<input type="checkbox"/>	<input type="checkbox"/>
Explaining what needs to be signed (and what the document means)	<input type="checkbox"/>	<input type="checkbox"/>
READING MATERIALS		
Reading materials aloud	<input type="checkbox"/>	<input type="checkbox"/>
Reading together during prep time	<input type="checkbox"/>	<input type="checkbox"/>
Putting important written ideas into pictures	<input type="checkbox"/>	<input type="checkbox"/>
UNDERSTANDING NUMBERS		
Showing numbers as pictures (chart/graph)	<input type="checkbox"/>	<input type="checkbox"/>
Writing numbers as words	<input type="checkbox"/>	<input type="checkbox"/>
Removing zeros, rounding off	<input type="checkbox"/>	<input type="checkbox"/>
Understanding meaning of the numbers	<input type="checkbox"/>	<input type="checkbox"/>
REMEMBERING IMPORTANT INFORMATION		
About members of board, committee, council	<input type="checkbox"/>	<input type="checkbox"/>
Things I have read	<input type="checkbox"/>	<input type="checkbox"/>
Important discussions	<input type="checkbox"/>	<input type="checkbox"/>
Questions to ask	<input type="checkbox"/>	<input type="checkbox"/>
Comments to make	<input type="checkbox"/>	<input type="checkbox"/>
Other:		

Facilitation Worksheet

Facilitator and Member to complete.

Partnership:

The best way for us to:

Communicate between meetings

Work together at meetings

How do we sit at meetings? (at the person's side, in the audience, etc.)

What kind of cues to use during the meeting? (physical, pointing, verbal, writing)

How will the member present positions/statements at meetings? (speak independently, with assistance, read member statements)

Make adaptations

Facilitation Worksheet

Facilitator and Member to complete.

Summary Page:

Personal Needs:

Member Duty Needs:

Professional Needs:

Facilitation Worksheet

Facilitator and Member to complete.

Agreement

As partners we will communicate openly and honestly with each other.

As the member, I agree to:

- a. Work as a partner with my facilitator.
- b. Communicate when I have questions or concerns about facilitation.
- c. Be prepared and professional.
- d. Communicate when I need to change my plan.
- e. Respect confidentiality of the facilitator.
- f. Other

As the facilitator, I agree to:

- a. Work as a partner with the member.
- b. Communicate when I have questions or concerns about facilitation.
- c. Be prepared and professional.
- d. Respect confidentiality of the member.
- e. Other

signature (member)

date

signature (facilitator)

date

signature (organization)

date

Make copies for facilitator and organization

The Earned Income Tax Credit in California

MAY 2015

Caroline Danielson

➤ **The federal government offers a tax credit for low- and moderate-income working families.**

The Earned Income Tax Credit (EITC) is designed to offset a family's federal income taxes. To be eligible, parents must earn less than about \$38,500 to \$52,500 (depending on their filing status and number of children) and have no more than \$3,350 in investment income. For tax year 2014, the maximum EITC for families with two children is \$5,460. Single filers with no dependents who earn less than about \$14,500 to \$20,000 may also be eligible for a small credit. Filers who owe no taxes after accounting for deductions receive their full credit—for the 2012 tax year, roughly 4 in 5 California EITC claimants were in this category. The average credit for tax year 2012 was \$2,335. Statewide, 19.9% of tax filers qualified for the EITC, although eligibility varied across counties.

➤ **The EITC is one of the largest social safety net programs.**

In California, 3.1 million tax filers (most of whom had at least one child) claimed \$7.3 billion in EITC for the 2013 tax year. Government outlays on the EITC were about the same as on CalFresh food assistance and more than twice as much as federal and state expenditures on CalWORKs cash assistance (\$3.2 billion). According to the IRS, California's EITC participation rate in 2010 was about 71%—lower than the estimated rate in the nation as a whole (79%) but higher than statewide participation rates for both CalWORKs and CalFresh. Most who are eligible for but do not receive the EITC fail to file a tax return in the first place.

➤ **Unlike many other states, California does not have its own EITC.**

Several state EITC bills have been introduced but not passed in recent legislative sessions—two in 2011–12, one in 2013–14, and four in 2015–16. For example, Assembly Bill 43, one of the measures introduced in 2015–16, proposes a state EITC worth 60% of the federal credit for single filers with no dependents, 35% for filers with children under 5, and 15% for families with older children. Among the 26 states with their own EITCs, this kind of “add on” to the federal credit is common. It eases the state administrative burden, but limits the ability to tailor the EITC according to state priorities.

➤ **Citizen children with unauthorized immigrant parents are not eligible for the EITC.**

Unauthorized immigrants can and often do pay taxes without a social security number, but they cannot claim the EITC without one. As a result, a million or more U.S.-born or legal immigrant children in California are ineligible for the EITC. This situation could change. If President Obama's recent executive action on immigration withstands legal and other challenges, unauthorized immigrants who gain deferred action status *may* be able to obtain social security numbers.

➤ **The EITC encourages work.**

Research has shown that the EITC encourages employment among single parents who have participated in CalWORKs and also among the broader low- and moderate-income population. According to the California Poverty Measure, which incorporates taxes paid and tax credits received, EITC dollars represented the difference between living in poverty and not living in poverty for about 430,000 adults and 368,000 children in California in 2012.

➤ **Most EITC claims were made by full-time workers.**

In 2013–14, 62% of total EITC paid out to Californians went to full-time workers. **Involuntary part-time workers** (those who would prefer full-time employment) claimed 26% of the total, and just 12% went to voluntary part-time workers. The majority of EITC dollars went to Californians with either a high school degree (28%) or less (38%).



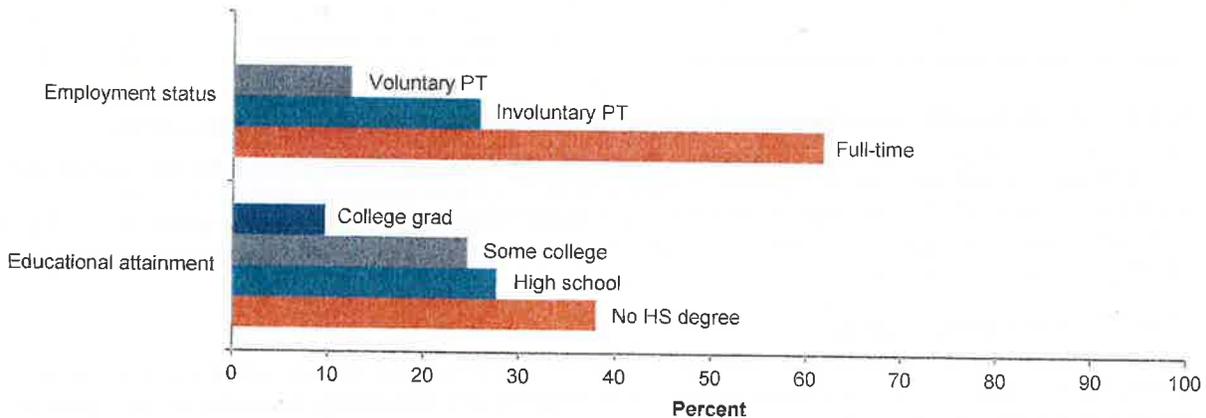
For the 2012 tax year, EITC claims varied across California counties

County	Share of tax returns claiming the EITC	Total EITC received (millions)	County	Share of tax returns claiming the EITC	Total EITC received (millions)	County	Share of tax returns claiming the EITC	Total EITC received (millions)
Alameda	14.1%	\$185.7	Marin	7.7%	\$13.1	San Mateo	8.9%	\$51.1
Alpine	20.3	0.2	Mariposa	15.9	2.3	Santa Barbara	15.5	56.6
Amador	13.6	3.8	Mendocino	21.7	14.9	Santa Clara	11.5	175.0
Butte	20.8	35.3	Merced	31.0	68.9	Santa Cruz	15.4	34.2
Calaveras	15.2	5.2	Modoc	21.2	1.4	Shasta	20.8	29.8
Colusa	22.4	4.4	Mono	15.8	1.5	Sierra	17.8	0.4
Contra Costa	12.2	113.7	Monterey	20.3	82.5	Siskiyou	21.7	7.4
Del Norte	24.3	4.7	Napa	11.8	13.4	Solano	16.2	60.4
El Dorado	12.6	17.1	Nevada	14.3	10.2	Sonoma	12.3	47.0
Fresno	30.9	273.7	Orange	15.4	419.5	Stanislaus	25.1	113.8
Glenn	24.9	6.0	Placer	10.8	30.5	Sutter	23.8	19.2
Humboldt	21.2	19.6	Plumas	16.4	2.6	Tehama	24.0	12.1
Imperial	43.4	77.0	Riverside	24.6	510.4	Trinity	21.3	1.8
Inyo	15.4	2.4	Sacramento	20.8	280.2	Tulare	34.2	142.2
Kern	28.5	223.1	San Benito	18.6	9.6	Tuolumne	16.3	6.9
Kings	29.3	35.7	San Bernardino	27.5	549.6	Ventura	15.1	111.4
Lake	24.8	12.0	San Diego	17.7	518.9	Yolo	16.3	25.9
Lassen	16.6	3.0	San Francisco	11.8	75.5	Yuba	27.8	16.6
Los Angeles	23.4	2,145.9	San Joaquin	24.3	151.6			
Madera	26.9	35.6	San Luis Obispo	13.3	27.8			

Source: Brookings EITC Interactive.

Notes: Differences across counties are due to variation in both eligibility and take-up of the EITC. Eligibility hinges on adjusted gross income, and filers must have social security numbers and limited investment income. Most recipients have one or more dependent children.

The majority of EITC dollars go to full-time and less-educated workers



Source: Author's calculations from the CPS-ASEC for 2013 and 2014.

Note: Statistics refer to percentages of total EITC dollars within each of the education or work categories shown among adults ages 18–64. Part-time categories include those who worked part-time for any portion of the year, even if they usually worked full-time. For married couples, characteristics of spouse with more work used.

Sources: Administration for Children and Families, U.S. DHHS; Bohn et al., *The California Poverty Measure: A New Look at the Social Safety Net* (PPIC 2013); Food and Nutrition Service, USDA; Internal Revenue Service; Pew Research Center, *Unauthorized Immigrant Population, by State, 2012*; Hill and Hayes, "Undocumented Immigrants" (PPIC 2013).

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UT San Diego: California tax credit would help working families

By Toni Atkins & Shirley Weber 5p.m.June 12, 2015

California is on its way to making a full economic recovery. Yet many working families are still not reaping the financial benefits. In fact, many families are falling behind. Recent reports indicate that our state has one of the highest poverty rates in the country and the highest rate of child poverty.

One proven way to help struggling working families in California is through a state Earned Income Tax Credit (EITC). Currently, 25 states have implemented their own earned-income credit to supplement the federal EITC. States like Rhode Island and Maryland have had a state EITC in place for more than 25 years, and they are working.

It's high time that California joins them.

We can't wait. At stake is the economic well-being of 825,000 families who will immediately benefit if the state implements the EITC.

But the state's lowest earners aren't the only ones who will benefit. So will California. In 2012, the federal EITC injected more than \$7 billion into our state's economy. With a new state EITC, Californians stand to gain an additional \$500 million in spending power. These are dollars that can potentially go back into the economy.

A state version of the Earned Income Tax Credit makes a lot of sense. Policy experts and politicians on both sides of the aisle agree that the EITC is one of the best ways to create economic opportunities for working families and their children. It is also an important step in providing a pathway to upward mobility.

To be clear, this is not a "welfare" program doling out charity. It's an earned tax credit for working individuals first proposed by President Ronald Reagan that has enjoyed bipartisan support over the years.

Contrary to what some believe, the majority of recipients are struggling Californians who are employed – many of them fully employed. However, they are struggling in low-wage positions that make it difficult to make ends meet and to get ahead.

To put it simply, many working families are falling through the cracks. This is especially true in high-cost areas like San Diego, where the poverty rate has increased to 15.2 percent and nearly one in every five children live in poverty.

The EITC would provide an immediate relief for working families that need it most. A large majority of low-income working families incur debt to pay bills and buy essential items such as food and diapers. Often they experience a hard time paying down their debt. Studies show that families use the EITC refund to reduce debt and purchase goods and services they would otherwise not be able to afford. An EITC refund can help alleviate stress, manage debt and aid families in avoiding dire situations like evictions.

The EITC rewards employment and encourages work. Studies show that many families view the EITC refund as a reward for having a paid position. And it encourages work because the value of the credit increases as income rises before eventually phasing out at the top end of the eligibility scale. Studies have shown that since the federal EITC was introduced in the 1990s, there has been an increase in paid employment, especially for single mothers.

To date, millions of low-income working adults and their children have benefitted from the EITC at the federal level. Among the biggest beneficiaries have been young children who experience long-lasting positive effects that could potentially impact future generations. Research shows that when you lift a low-income family out of poverty, young children see significant improvements in health, more schooling and higher earnings in adulthood.

California's economy will continue to grow in the coming years. We cannot stand by and watch hard working families sink deeper into debt and poverty as the rest of the state prospers. We must take decisive action now to implement a state-level Earned Income Tax Credit to help ensure that all families have an opportunity to succeed.

It's a win-win for California and families.

Atkins is Assembly speaker and represents the 78th District. Assembly member Weber represents the 79th District. Both are San Diego residents.

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