PEOPLE FIRST OF UTAH

People First Advisor Handbook

Toolkit for People First of Utah Advisors

HANDBOOK OF ADVICE FOR THE ADVISOR FROM PEOPLE FIRST MEMBERS AND THEIR FRIENDS

Toolkit for People First Advisors

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Produced for the People First of Utah 2015 by
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Advising self-advocacy groups is one of the most interesting, fun, frustrating, exhausting, and fulfilling jobs a person can do. Thoughts of the People First members often take over an Advisor's mind, heart, and even dreams. Many Advisors are relatives and friends or support persons for people with disabilities Advisors are usually people who like people and appreciate the differences between people. Advisors are keenly aware of the need for self-determination and feel that they can't just sit on the sidelines watching. They want to devote their time and energy to helping others meet their own goals. People First members appreciate their Advisors, look up to them, and trust them. However, self-advocacy training does not develop out of a simple relationship.

Giving good support to someone else is one of the most rewarding tasks in life; but it comes with danger. Giving the type of support that borders on leadership can keep the group dependent upon the Advisor. If the advisor is the leader, then the members are not able to develop their own leadership roles. That deep trust and dependence from another can feel great to both the Advisor, who basks in being important, and to the member who feels protected and safe; but, in the end, the Advisor has done more harm than good, if People First members become dependent rather than self-determined. That said, there is no doubt that People First members need Advisors and that advising is a rewarding role and one that is much needed.

This handbook was created by People First members and their friends to assist Advisors in doing their work in a way that results in a People First group full of empowered, active, resourceful, and strong self-advocates who enjoy the support of an advisor who takes quiet pride in a supportive role in the development of People First members.

We believe you are a person like that, because you chose to spend your time reading a handbook on how to be an effective People First Advisor who supports people skillfully. We already feel ourselves beginning to trust your judgment.

Introduction to the History of Self-Advocacy

Some say that people with a disability created self-advocacy groups after meeting at a conference after realizing that if they worked together, they would have more success in negotiating for homes, jobs, and relationships in the community settings rather than in institutional settings. Others feel that the self-advocacy movement was an outgrowth of the quality assurance responsibilities placed upon the service system. Most likely, there was a synergy between the needs of people who use system services and the needs of the system to demonstrate that they were providing quality services. In any case, the self-advocacy movement was born.

Over the years, studies have shown that historically most of the support for self-advocacy training has come from the system and was delivered by either system employees or by people paid through universities or hospitals, with government funds. In many ways, service system leadership was the only way to establish widely available self-advocacy training in a way that was sustainable and accessible. However, over time, other entities became interested in self-advocacy for people with disability and support began to trickle in from corporations, foundations, and through community fundraising.

For many years local self-advocacy training groups (commonly called People First groups) were held across the nation on a monthly basis. Advisors were expected to teach parliamentary procedure (including speech making, voting, and help People First officers to conduct ordered meetings based upon an agenda). Advisors were often assigned the role as part of their job, or they were self-identified volunteers for the branch of the system that supported a particular People First group. Once national annual meetings were put in place, Advisors were able to attend training sessions and were able to share ideas informally with other Advisors.

Over the years, People First groups have sought system change to allow them to live in community settings, have real jobs in the community, and to develop meaningful and lasting relationships that are not broken by upheavals in personal care funding. There was little established oversight of individual People First groups. Some groups seemed to be based upon planning and holding dances and parties; other groups had community service responsibilities. Despite the lack of a national agenda, members and Advisors were committed to the idea and growth of self-advocacy as a necessary component of each local system becoming stronger. Eventually funding was found for a national self-advocacy group, comprised of elected members from States with membership, and over time, the system began a slow shift in its method of support. State institutions were closed after successful lawsuits on the part of institutional residents. Leaders with physical disabilities established Independent Living and Group Homes for people with disabilities, as well as individual support for apartments in the community. The living situations so long considered only a dream were becoming a reality. There is still so much left to do, and the changes have come so slowly that some people's entire lives have passed by, without the changes they sought to bring about.

Introduction to People First philosophy

To begin with, the term "People First" means that we always talk about people in terms of respect. Specifically, we put the person first, before the disability. We do that because we want to make the point that the person is a complex human being with many talents, skills, dreams, and competencies that are poorly served by any disability label. For example, if the disability were stated first – if we said "an autistic"- then a mental image of whatever the listener thinks "an autistic" is, would come to their mind. They might even let that mental image bleed across into what they actually see in the person in front of them, rather than to see the real person in all of his or her complexity.

So we say, "a person" rather than "an autistic". In fact, stop and think why we need to say the name of any disability at all. If it *must* be said to make a point clear, then just put the person first and say, "a person with a disability". A People First group was an early attempt to get everyone to stop using labels when talking about them, so leave the label off.

People First philosophy is that all people have a wide range of talents, skills, competencies, and abilities. Whatever the "disability" is said to be, there is a way to remove the barriers against full participation so that the person can use their talents and accomplish any goal they may have. When we are working with people, we keep in mind that each of us can accomplish any goal we wish, as long as we are able to identify the barriers and find ways to remove them from our pathway so we can reach our goals.

To this end, the Advisor of a People First group would be tasked with encouraging members to set goals, seek training, find resources, remove barriers, and stick-with-it until they reach their goals; both as a group and individually.

Disability is reported to run at about 12% nationwide (range 9.3-16.9%). There is a great deal of interest across sectors in the U.S. in their effort to live real lives in the community (rather than in institutions), with real jobs and real homes. However, action is constrained by a long history of belief in a beneficent government and a medical system that knows what is best for 'people with disabilities'; and many special interest groups competing for both dollars and control. Additionally, the structure for self-advocacy is highly conflict ridden.

People with disabilities have strong feelings about their own lives, and their freedoms. But in general, what we can think of as the pressure to create change- or "change relations" are defined by activists (largely system employees) who may be working, at any given time, at the behest of people with disabilities or they may be supporting the interests of the system.

In this case, not only are the voices of the people marginalized for all of the usual reasons, but also due, in some part, to the characteristics of their disability, as a group and to wide-spread myths and ideologies about characteristics of their various disability. Perhaps chief among the issues faced by people with disabilities are difficulties with the rapid cognitive processes required in negotiations, and the widespread conflict of interest occasioned, between members, officers, Advisors and system representatives - whose identities are overlapping and confused at every level and across the nation.

Key issues being faced at present are the potential that legislation may respond to social and monetary pressures by consolidating disability types, at present quite differentiated by diagnosis, into one disability treatment and service system. With anticipated changes in the system, people with disabilities are likely to go from having their own service system to being at the bottom of a stratified medical-model department.

In many ways, this change will benefit all persons receiving services, however, a composite disability system could predictably stratify specific user voices. It could be anticipated that representation will occur in a hierarchy established by social value, placing wounded military veterans at the top, followed by long-term tax-paying persons who acquired disabilities due to advancing age, then accident victims, and so on. It can be anticipated that those with intellectual disability and mental health diagnoses will be further marginalized, unless there is a stratified selection of representation within the system.

In any case, the process will still belong to the government, but we hope to incorporate a stratified representative requirement in the legislation. People with disabilities have a national organization with loose ties to local People First branches, as well as friends and associates supporting their goals, including family members, service workers, educators, health care workers, consultants, and professors all working toward this end. Advisors of local, state, and national self-advocacy training groups (like you!) will be key in the way that access to self-determination will unfold.

Introduction to the role of Advisor

The People First Advisor wears many hats. They may teach or provide training, they may assist with strategic planning, they may help with creating financial budgets and help obtain funding, and they may provide training in professionalism and leadership. The Advisor needs to have had earlier training and experience in doing all of these things, so that the Advisor is able to be of real assistance to the People First members.

In the distant past, it was enough for an Advisor to be a warm person who was socially similar to members, was able to enter into friendship with members, and support them emotionally. That was probably a very good place to start, but it is no longer enough. Current Advisors need to be professionals who can offer their experience in business, education, law, or advocacy, and their skills as trainers, competent relationship builders, and competent "sounding boards" for members to approach. Advisors need to be well trained, themselves, so that they will be able to respond to any situation with good judgment.

Ethics and Advising

Advisors are not able to be friends with members of the groups they advise; this relationship can be friendly, but must remain professional. There are many reasons why this must be. You may be able to think of others, but some that come easily to mind are given below.

- An Advisor must be fair to each member and treat every member the same.
- An Advisor must be able to help mediate disputes among group members.
- An Advisor must be able to support the majority in any decision.
- Each member deserves to be supported fully and fairly, so no single member is entitled to more support or time than is given to any other member.

Advisors must be ethical in all of their actions for the group; this includes financially, socially, morally, and professionally. It is critical that the Advisor determine that they will avoid even the appearance of unethical behavior.

- Have financial statements shown at each meeting, stored electronically, and in paper format. The CPA is a responsibility of the executive board and the ED, in regard to the operations of the State Office and each chapter. However, in order for your chapter to raise funds and track the funds that are raised, you will need to follow transparent guidelines at your meetings.
- Never share a hotel room with a People First member.
- Never lend money (except in a public situation such as while traveling, and then only with dire need).
- Never drive a long distance alone with one member, always have another person along with you.
- Never engage deeply in personal talk about your own life with a member.
- Establish a system for the meetings that is Agenda-based, tracks and reports all voting, committee actions, plans, and outcomes and so on.
- Keep all of your local People First chapter group work in a Binder. This includes all agendas, all actions voted upon, and all committees and their outcomes in the binder. This is the history of your chapter and can always be returned to for clarification if any questions about activities would arise later. State records are stored in the state office; and your chapter records may also be required in the future.
- Other: follow all state and federal laws pertaining to services for vulnerable populations and non-profit agencies.

  [http://hspolicy.utah.gov/files/dhs/2-%20Personnel/2-3-%20Code%20of%20Ethics.pdf]

Ethical behavior is contagious. When the group sees the professionalism of the Advisor, they follow suit. People appreciate being part of something larger than themselves that gives them something higher than themselves to stretch upward to reach. Let that ethical standard be the one you live by, as an example and model for the group.

Auntie Claire's Cheat Sheet of REFLECTIONS FOR ADVISORS

Before taking any action, ask yourself:
Who gains from what you are about to do- you or the members?
Whose agenda is this? Make sure that all agendas belong to the people.
Why do I want to do this? Am I doing this for what is in this for me?

Ask yourself after every meeting:
How did this meeting go?
What can I do to improve the next meeting?
List for yourself what went wrong and what went right at the meeting.

Learning how to help

Think back over the people who have helped you reach your goals throughout your own life. There may have been a coach who helped you reach a personal goal; a teacher who helped you prepare for a specific opportunity. What most of these types of helpers have in common are a belief in you, and your talent, and ability. They have the knowledge of what you might be able to do better to improve, they are willing to point out ways you can improve, they encourage you and let you know they are pulling for you. But they don't do it for you. They don't want anything "back" from you in repayment, and they don't get personally involved. That is our goal. Help people grow and develop, but don't ask for anything in return. Not even appreciation.

Quick Look: Do's and Don'ts for Advisors

People First members and Advisors have put together a short list of things that Advisors should do, and some they should not do. This list can be used as a quick reference from time to time, to help you assure yourself that you are on-track with your group and are acting in the best interests of your group. It is shown on the next page.

ADVISOR "TO-DO DO's"	ADVISOR "PLEASE-DON'T's"
1. Advisors communicate well so that everyone can follow what they are saying. 2. Advisors are honest and trustworthy. We need to believe in our Advisor. 3. Advisors give advice when asked but not give advice when not asked. 4. Listen and ask questions to help develop ideas, ensure goals are set. 5. Advisors pay attention to the way that members are working together. Figure out who is being left out and Find ways to help everyone get involved not just the few outspoken members. Everyone needs their own job and everyone needs the space to do that job on their own. 6. Make sure everyone knows when and where the meeting is. 7. Be a role model (in your dress, communication, professionalism) so we have something to live up to. 8. Be knowledgeable and prepared. People count on you to bring information to their attention. 9. Support getting training for members when they ask for it.	1. Advisors do not take over for the President or other member. 2. Don't make decisions for the People First group without members talking it over and voting first. If something comes up, Advisors should call the officers. 5. Don't assume that everyone agrees Pay attention to the whole group. Check with everyone to make sure everyone is on the same page. 6. Don't talk too much. Listen more than you talk. Only give advice if you are asked. 7. Don't do too much for the members. Don't do things for them unless asked. Show people how to do the things that they want to do. 8. Please don't quit before the end of your contract. If something comes up that upsets you, please let us work things out if things go wrong. We will all learn from it. 9. Don't figure things out for members. Assist if asked in their work of figuring things out. 10. Don't make anything worse. Sometimes things will go wrong. When they do, stay positive.

9. Attend every meeting, even officer's meetings. If an Advisor is ill and can't attend, then the Advisor should find, train, and send a substitute.

10. Make sure people understand voting.

11. Support the officers in keeping control of the meeting. Sometimes people get off track and start talking about different subjects. That just confuses the group. Back up members who are trying to follow the rules and regulations.

12. Understand the purpose of PF and help officers ensure that they are setting goals and projects that fall under the guidelines of best practices for PF.

13. Help officers and members get the information they need to make good choices. And, most importantly, teach people how to find high quality resources and information so that next time they can do the work on their own.

14. Treat all members and officers the same way. Don't have favorites. They don't support the development of cliques.

15. Create meeting spaces in public areas on good transportation lines.

11. Don't tell people how to feel about things. Find out what their feelings mean and help the group look for ways to improve things.

12. Don't be afraid. Let officers and members take chances and learn from both successes and failures.

13. Advisors should not look for information that will discourage members from attempting a difficult task.

14. Staff should not be advisors. Advisors should be from the community so they are free to act as they feel it is right.

15. Don't talk people into doing what you want them to do.

16. Don't embarrass people.

17. Don't over-react. Find the facts. Don't jump to conclusions.

18. Remember, Advisors don't always know what is best for us.

Getting Started - Applying to be a People First Advisor and Earning Certification

All chapters of People First in Utah are conducted under the oversight of the state People First office. People First of Utah has a statewide certification procedure in place for Advisors. This process is managed through the offices of the Utah Developmental Disabilities Council in Salt Lake City, Utah.

Utah Developmental Disabilities Council
155 S. 300 W., Suite 100
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New Advisors in Utah are required to watch an Advisor training webinar and read the Advisor Handbook created by People First of Utah. The process of applying is managed by each local People First group. The President can give an applicant the application form, or it can be downloaded from the People First of Utah website. The applicant will complete the form and return one copy to the President of the local People First group, and another copy of the application to the Utah DD Council, at the address above. There will be a background check and the Advisor may be asked to take part in a group interview with the People First members and officers and a representative from the state council on DD. While this can be a time- consuming process, it is important for the group to have an Advisor who will dedicate their efforts to helping the group and its members grow and develop over the course of the contract.

A state disabilities agency will provide funding for the position of Advisor, as well as some travel for the Advisor, and in exchange, the Advisor will do everything that he or she can to support the goals of the group and individual self-advocacy training during the course of the contract.

Certification is also offered for Advisors who take a course on Self-Advocacy professionalism. The certification process involves reading several books, watching several webinars, writing reflection essays on the contents of the readings and videos, and finally taking part in an online discussion with other new advisors and experienced advisors.

Certified Advisors earn a higher pay than do other Advisors, and they are the only Advisors from Utah eligible for state Advisor positions.

2

Introduction to Working With a People First Chapter

WHAT DOES AN ADVISOR DO? / WHERE DOES THE GROUP MEET? / HOW DO PEOPLE GET TO MEETINGS? / LEADERSHIP DEVELOPMENT / GROUP FACILITATION INCLUDING CONFLICT RESOLUTION AND LEADING DISCUSSION / WHAT ABOUT CONSELING? / HOW TO PLAN WITH OFFICERS AND MEMBERS / LONG-TERM PLANNING WITH PEOPLE FIRST GROUPS / FUNDING ISSUES FOR THE PEOPLE FIRST GROUP

What exactly does an Advisor do?

The Advisor works with the members of People First in several ways. The Advisor serves at the pleasure of the State People First office, housed in the UDDC. The Advisor is responsible for all state by-laws, regulations, and responsibilities. There are additional Advisor responsibilities to the officers, members, and even to the local community. Certified Advisors are eligible to work at the state level in People First activities and at the national level. Each of these responsibilities will be described below.

Officers: The Advisor supports People First officers by assisting them in all of their activities. The Advisor is constantly alert to training needs on the part of officers so that they can learn to manage the routine and ongoing tasks of a People First group. Officers need to keep an annual, monthly, and programmatic calendar. They need to set Agendas with the help of the Advisor for each meeting and distribute the Agenda at meetings. Officers need to help members explore their ideas in an orderly way in which every voice is heard; and set an annual calendar of events. If the group wants to travel to a conference, the Officers need to address fundraising. Officers need to learn how to write grants and keep a budget. In addition to seeking training for Officers in all of these areas, Advisors also make contacts in the local community; help seek volunteers, training, event planning, and donations, and find ways for the group to participate in a meaningful way with other local community groups. Advisors help officers learn how to keep the books, type, or otherwise create documents, keep up with mailings and communications across the state and national groups, and work on the annual report. The Advisor assists in any way that is requested by the President.

Members: Members are constantly in training to become officers, and Advisors play a key role in helping every member of the People First group to prepare to advance to a leadership position, if that is their wish. In addition, Advisors help People First members find out what is going on in the greater community, set goals for personal growth, and help people learn about the issues they will be voting on. People may need support in planning for conferences and travel, and people may need help in mediation of disputes within the group so that harmony can be established.

The Community: Advisors develop an awareness of what is going on in the community and find ways for People First officers to interact with other leaders in the community. For example, perhaps there is a city-wide drive for used coats or blankets that PF can participate in; perhaps the bank collects funds for the Fire Fighter Survivor Fund, and PF members can participate in that activity. Maybe a coalition between PF and other disability groups can work together on disability awareness or other community awareness programs. The more visible and active the PF group, the more potential funding and grant sources are available to the group. The interests of the group and the needs of the community are the determining factor in community involvement. Not all activities are appropriate for every PF group.

State People First Groups

All Chapters in Utah are members of the statewide office. Most states have a statewide conference every few years. Certified People First Advisors are eligible to serve on the planning committees and work on the Agendas and Planning Board with Officers and Members of People First from around the state.

National People First Groups

Certified People First Advisors are eligible to support elected People First members in attendance at national People First board meetings and conferences; and may be selected to work with the People First representatives on a national U.S. Community Advocate Association.

Where does the group meet?

People First groups meet on a regular schedule that may be set to occur once a week, twice a month, or monthly. Since many members do not drive, it is important that the meetings are held in central locations, on train or bus lines. The local chapter Advisor searches out a few good meeting places. Officers place the item on the Agenda for group discussion. Presentations are made to highlight the benefits and problems of each meeting place, and then the President calls for a vote. All members vote. The Advisor is not a member and never votes at any PF meeting.

Some meeting locations that have worked for People First groups in towns and cities are: the public library, a college, a coffee shop, a high school, a church, and a fast food restaurant. In some rural areas, Skype, online meeting places, or an Internet Videophone can be used to allow people to attend PF meetings from their own homes, if transportation is not available.

How do people get to meetings?

One reason for a central meeting location, on a main bus line is so that people are able to take public transportation to the meetings. The Advisor will want to check the various train and bus schedules and let the President know the times that buses pass the meeting place so that people are able to leave the meeting without having to wait too long for the next bus to come by. Meetings in the evenings and on weekends are particularly important to schedule close to the time that buses pass the building so people are not exposed to dangers after dark, in winter, or at times when public transportation occurs less often.

Leadership development

The Advisor is tasked with providing opportunities for every member of the People First group to develop their personal leadership skills. This may be accomplished in any one of several ways. The Advisor may talk with the President about what training needs the group has, as well as speaking with individuals about their personal goals for professional development. Then, the Advisor researches the opportunities online and in the community and helps PF members determine if anything available is of interest to them. In addition, the PF members should have Person Centered Planning (PCP) teams who help the person set goals for the future. The PF Advisor may contribute ideas and suggestions – even practical assistance – to the PF member through working with their PCP team.

Types of training that are of interest to PF members often include continuing education in math or reading, public speaking training and experience, preparing for travel, leadership, or officer training, and training in working more effectively with the system. A wide range of potential training materials are available through an internet search, and include workbooks, online webinars, and local training through service clubs or schools.

Group facilitation, including conflict resolution

Group facilitation is a learned skill. Some people are naturally gifted at facilitation, but everyone can learn how to facilitate in an effective manner. There are six key tasks of a facilitator, including the following: (1) Getting people interested and keeping them interested; (2) Getting people on the same page so that work can be accomplished; (3) Keeping people on the topic until the process is done; (4) Making sure that all members are engaged and participating; (5) Keeping neutral while consensus is being built; and, (6) Helping the Officers build a follow-up "task list" for members and themselves and creating an Agenda for the upcoming meeting during the meeting, while interest is still high. Each will be explored in the passage below.

(1) Getting people interested and keeping them interested.

An Advisor is a powerful role. Members, other Advisors, and the community at large look up to Advisors and admire them for their loyalty to the members of People First and to the process of equality and justice. Successful Advisors keep the spirit and energy high in their groups by being positive, looking forward, seeking interesting ideas to share, and guiding with their heart.

(2) Getting people on the same page so that work can be done.

People First members are just like everyone else- everyone has a great idea and something to say about everything that comes up. Sometimes the conversation will wander, sometimes it is hard to settle down to work, and other times, the ideas shared become a tug-of-war between factions. The Advisor's approach to disagreements as a chance to learn and grow will take the group a long way toward a new and better idea that can arise from the ashes of the first wave of ideas.

(3) <u>Keeping people on the topic until the process is done</u>.
It is easy to be sidetracked by chitchat or pulled into arguments that cannot resolve the issues at hand unless the President, with the support of the Advisor, continually returns to the topic in a non-judgmental and friendly manner.

(4) <u>Making sure all people are engaged and participating</u>.
The wise Advisor keeps an eye on who is participating and who is just sitting. Sometimes it is best for the Officer to go around the table to 'take a reading' or 'take a straw poll" so that everyone weighs in. Training of the President so that the President is the one to do this, is key.

(5) <u>Keeping neutral while consensus is being built</u>.
The Advisor can easily sway members quite without meaning to, if the Advisor shares his or her opinion. The wise Advisor keeps their ideas and beliefs quiet. The decisions to be made are to be made solely by the members and officers.

(6) <u>Helping the Officers build a "task list."</u>
For members and themselves and creating an Agenda for the upcoming meeting during the meeting, while interest is still high is key to success over time.

What about counseling?

From time to time, an Advisor will become aware that there is a serious issue at play in the life of a People First Member. It is never a good idea for anyone but a trained counselor to offer mental health services, but a kind word and open mind may allow the PF member to share a situation of concern with you. You may, from that vantage point offer suggestions as to where the PF member should turn for professional help, whether legal, social, emotional, or financial. The Advisor can offer to assist with the initial call or contact. The Advisor is *not* the person who should become personally involved and 'help' the PF members solve his or her problems.

How to plan with officers and members

The Advisor should never meet alone with officers, except, as per the by-laws of the organization, to establish annual guidelines, plans, and funding priorities. The Advisor should never meet privately with a single member when others are not present; with the exception that Advisors should provide training for members at the request of the group, provide transportation in a particular situation, and assist individually in arranging personal professional development for members as appropriate.

Long-term planning with People First groups

Long-term planning should be a three-step process. Step One: Local groups should be aware of and involved with statewide PF plans, and to some extent, local groups will base some of their annual plan on what they want to do with others in the state. Step Two: the Officers and Advisor should have an annual retreat at which they evaluate progress towards goals from the year prior and set broad goals for the coming year. At the same time, training may take place on any skills of interest to the Officers and Members. Step Three: Officers lead strategic planning efforts with the members of the local People First group.

Funding issues for the People First group

Advisors need to work with Officers, Peer Advisors, State Advisors, and the local DD Council in order to identify both financial need for the year, as well as potential sources of funding. Strategic planning is the first step of the funding process, since it is only when the group knows what its activities and costs will be that they are able to create a request for funding. Funding sources may be identified a number of ways. There are corporations, foundations, community fund-raising and many other avenues to pursue. Links to funding resources are provided in Chapter 6. Training for grant writing and local community fund raising is provided online and at conferences. Grant writers may also be hired from various non-profit and private companies.

3

Introduction to Training

TRAINING FOR SELF-ADVOCACY / FORMAL VERSUS INFORMAL TRAINING

WHAT KIND OF TRAINING WOULD BE USEFUL? / WHAT DO PEOPLE NEED?

HOW DO WE GET TRAINING? / TRAINING FOR GROUPS, TRAINING FOR INDIVIDUALS / A WORD ABOUT POWER AND EMPOWERMENT.

Training for self-advocacy

The reason for the People First organization is to teach self-advocacy skills and support their use in meaningful ways. So, actually, all of the rest of the work that Advisors do in preparing, providing transportation, arranging meetings, and finding resources is for nothing, if people don't learn how to be community advocates and learn how to speak together with one voice in negotiation for the systems and structures that they need.

Sometimes it is easy to get confused about what self-advocacy might be. People wonder if it is a personal skill. Some people are taught that they are expected to learn to demand a different roommate (that someone else is supposed to arrange), or a new job (that someone else is supposed to find for them). These actions may hold something in common with self-determination; but they are more similar to self-promotion. They are not a kind of self-advocacy in a way that will result in meaningful community and legislative change, although they may have been a good place to start.

Over the years, many wise and proactive Advisors and their supporters have created training tools for helping people learn how the system works, how funding works, and how laws are created, voted upon and carried out. People have learned how to become partners in policy-making and have attended legislative sessions. They have participated in large-scale presentations to lawmakers to inform legislation about their needs. This excellent work has effected change in some states, and that has been of benefit overall as changes may slowly spread from one location to another.

However, the regularities of social power tell us that individuals can never negotiate effectively with a system. It is only *two systems that can jointly negotiate and resolve an issue;* a system and an individual cannot negotiate. For this reason, people with disabilities need to learn how to create, staff, and control a bargaining group, like an Association. The People First Association, or a national community advocate association, would negotiate with the system and with legislators for the rights and representation for all persons with disabilities. Their Association would have well prepared and effective representatives sit on the Councils, Planning Teams, and work with legislators. This is true self-advocacy because it focus' on meaningful negotiation for the entire 'class' of people with disabilities, and has a hand in arranging the terms and content of the national agenda.

Everything is in place for the establishment of this association. There are People First groups in all states. Each state has collective meetings as well as local meetings. Local, state, and national level training is already held on a monthly and annual basis. Training topics include self-advocacy and the skills needed by People First members to effectively bring about the lasting and widespread changes they seek. All that is missing is the will to bring state leaders together under a banner of participation in system discussions on resource distribution, oversight of system regularities, and legislated protections and services for people with disabilities. Something like an association. Just as people with any special interest have those without the condition in their association, the PF association will need people without a diagnosis of disability working with them. Can you imagine a Heart Disease association that insisted only people with heart trouble could belong? Or a substance abuse association that insisted only people addicted to drugs could belong? People without cancer are strong advocates of the cancer research association. Strength is found by having people in associations that bring many skills and talents, and that have an interest in a particular condition. But members don't all have to have the same diagnosis to be useful and effective members.

The service and funding systems for people with disabilities still in place were designed under the old medical model. They are focused on "treatment ." A new system might rather be focused on strengths, and have a basis in lifelong learning and personal growth. The reader can see the way that this newer model would begin by preparing people throughout their life span. For example, learning about self-determination and setting goals should begin during the Kindergarten years, in parent-child programming. It needs to continue incrementally through the school years.

The reader might just think of the way that this change would boost "Transition" into a true springboard into a rich life in the community. In this model, learning would continue through post-secondary coursework. During high school and after graduation people would join People First groups that were on fire for training each new wave of true advocates to enter the field. Training would remain the purview of local, state, and national groups, offered through schools and in the community. The Association would be the bargaining branch of the People First "family tree."

When we talk about the People First family, we are talking about a giant Redwood tree, not a twig. Advocacy begins in our local People First groups by training people in how to do things for themselves. It means taking stock of what skills people already have in place, and building upon them. It means sharing skills by cross- training in the group, and by making sure that each and every person in the group speaks up at every meeting. People need to set goals for their lives that involve learning new skills and promotion to greater levels of authority and leadership.

Formal versus informal training

The goal of each member of People First is to learn how to do something that will reduce barriers to their full participation in the community. The goal of each meeting is to provide a venue in which everyone learns something. To accomplish this important task, both formal and informal training methods must be utilized.

Advisors can nurture the sharing of skills and competencies between members of the group. Each member has a skill that they can share with others, whether they feel they need more support in their meeting, planning, and speaking skills. Some members can use the internet, others can type, others are good at making phone calls, and still others have skills in design, or are great at greeting others and bringing people together. No one does everything well and everyone can learn from watching another person do something well. Informal training, at its best, is to watch for the "learning moment" and explore more about what a particular member did well (right on the spot) so that others can learn from the exposure to a new idea; and the People First member learns how to teach. Of course not every Advisor will be good at this kind of training, and they may need to rely more upon scheduled or formal training opportunities.

Formal training is determined on an annual basis at the Officer/ Advisor meeting. It may have costs associated with it and it may need to appear in the budget as a line item. It is important for the Advisor to think through the year's goals of the members, set in their annual planning meeting, and help the Officers think about which types of skills the group needs to learn in order to meet their annual goals.

Formal trainers are available at no cost from many public sources. Some groups may wish to arrange training through public or college library staff in using the public computers for Internet searches or for typing documents and using email. Some groups may wish to send members to a Rotary Public Speaking course or arrange for a public speaking trainer to attend a number of People First meetings and train the entire group. Many teachers (high school and college) would be very interested in conducting training for the group in their area of expertise. Make use of community volunteers (through churches, schools, businesses). There may be interest in learning to negotiate effectively (formal training and informal practice) and lawyers are great at sharing this skill. There may be interest in sending members to a Partners in Policy Making course. The sky is the limit. Dream big with your People First group. Always look for ways to develop community relationships this way. These relationships can lead to many additional ways of collaborating and supporting the community.

One type of informal training that leads to formal training is to prepare members to give presentations at conferences. It starts when people learn how to use Word, PowerPoint, create a presentation, practice giving the presentation, and then deliver a polished presentation to other People First members at a conference. They key is that the Advisor is active only in the early stages in helping members look for the training that they need. The Advisor waits to be asked by a member when help is needed, and does not share opinions unless asked. That does not mean that the Advisor is silent. The advisor may want to suggest all kinds of training opportunities through helping the officers explore what the community has to offer; and helping members become aware of their own inner goals and interests.

What kind of training would be useful? What do people need?

The purpose of all training is to help People First members build their toolbox of personal skills – so that they can more effectively be advocates for their cause. One goal an Advisor may have would be to help prepare every interested member of the PF group to serve as a People First Association representation on each and every, council and national committee that makes decisions about People with disabilities. *As they say, "Nothing About Us, Without Us".* But we have to get ready to be effective at working with others and helping ourselves.

The Advisor can assist members and officers in thinking through the things they need to learn in order to run their own local PF chapter, and in order to support someone from their group (or another group like their group) to participate more fully at the state and national level.

A short list of skills to develop might be:

Voting and citizenship
Reading
Writing
Typing
Math and Budgeting
Phone Call effectiveness
Internet Use
Library Use
PowerPoint
Presentation skills
Speaking Skills
Advance Preparation skills
Negotiation skills
Public transportation skills
Finding a new job
Finding a new apartment
Developing and maintaining relationships

Training for groups, Training for individuals

Training plans are developed during the annual strategic planning process, reflect the statewide by-laws, and are tied to funding plans in advance of when they are needed. These plans are cleared with the state PF office, and they are supported financially solely by efforts of the local chapter, itself. Training is important for both individuals and for the entire group. Many types of training are available at no cost, online. Other types of training need to be done in person. Officer training can be conducted by former Officers for the incoming Executive Board; while other training can be done by anyone who knows how to do something that people want to learn. The community is full of people who would be willing to share their skills with a People First group. With permission from the speaker, the Advisor can tape the training from his or her place at the back of the room so that it is available for future use.

A word about power and empowerment

A lot is presented in People First guides concerning expectations of people's empowerment. However, people can only be as empowered as the system allows them to be. Empowerment is the right to negotiate meaningful change. Power (really called by the term "social power" in the literature) is the relationship between parties- usually the organization and the government. In order for People First members to have access to empowerment, they must develop the skills needed to work together for a common cause, and learn to negotiate with other systems as an equal. This requires training for PF members to prepare for seats at the table. To learn the tools of negotiation and to develop the interpersonal skills that will be effective in helping them reach their goals. The small, lifestyle changes that people want in their own lives will naturally follow the larger, sweeping changes only possible through negotiation as an association. This negotiation with the entity that sets the agenda, creates the rules, and controls the resources is the only way forward to meaningful and lasting change. Because we are changed.

4

Introduction to Advisors, Power and Empowerment

ADVISOR SELF-AWARENESS / QUESTIONARE FOR ADVISORS / PERSONAL RELATIONSHIPS IN THE GROUP AND RELATIONSHIPS BETWEEN GROUPS / WHAT'S IN IT FOR ME AS AN ADVISOR? / MOVING ON AFTER YOUR TERM AS AN ADVISOR.

Advisor self-awareness

Advisors are generally people who care a great deal about others and who wish to help others. Sometimes, under the exhausting demands of the day, we lose track of what our initial goal was, to teach people how to be self-advocates. It is a great idea to stop occasionally, and reflect upon the work we have done, and that which is still ahead.

Advising is a job that requires some level of sacrifice of weekend and evening free time, time with family, time to pursue hobbies and meet with friends. There is clearly an intangible reward for acting as an Advisor provides to each person who is willing to do the work, and stick with it over time. The first question is, "what is that reward?"

A second question might be, "what does the reward 'cost?"

Helpers help others. Advisors often want to help PF members get what they want (new job, better apartment, and the roommate they want). Advisors may want to help People First members learn to speak up for themselves, or have fun, or travel and see the world. Maybe the Advisor wants to travel and see the world, too. The Advisor may appreciate having the officers as friends and enjoy a special closeness with them. Some Advisors have said they are closer to "their" PF officers then they are to their family. This should be alarming.

Advisors need to stop now and then and ask themselves if what they are doing is good for PF members. Stop and figure out if what we are doing is actually better for ourselves in some way, than it is for PF members. What Advisors need to help them do this kind of self-reflection is a PF Advisor Peer Group. Self-reflection is a great tool, but it is hard to use effectively because most of us have a long history of being able to fool themselves into thinking what they are doing is right, because it feels right.

An Advisor Peer Group is just the thing needed to help us cut through the confusion and circular thinking to reveal exactly what the impact of our actions are for ourselves and for those we want to help. Advisor Peer Groups are informal associations of Advisors who meet at People First conferences and feel that they are working toward the same goals. They may ask these other advisors questions that the lay public would not know how to answer; they may seek solutions to thorny problems; and they may just appreciate sharing stories with others who understand the situation so fully.

The average time an Advisor holds the position is seven years (7), but the range is between 2 months and 25 years (and counting). While clearly we hope to hold onto good people longer than two months, there is something to be said for changing the Advisor every few years, because it is a good idea to get new ideas for the group and to try new things. However, many people stay in the role long after they have anything, really, to offer to the task of preparing people to own the struggle- and they have become comfortable in the security of the relationships they have developed with members.

A Peer Advisor group may offer the advisors the closeness they are seeking from members, but in a more wholesome manner. While self-reflection can disappointingly show us an outcome of our actions that we wish were not so, it is comforting to share the process with like-minded people who understand how easily such mistakes can occur. There are also tools an Advisor can use to explore his or her impact on the group- published in various places.

It can be useful to use a published tool to help think through the key issues faced by those who want to help others. A short summary of the tool is provided, here, to get you started.

Question:
1. Do I do things for others that they could do for themselves?
2. Why do I want to help others?
3. What is it that makes me want to put others before myself?
4. What do I respect about myself?

Figure 1: The tool introduced here is now available as an electronic book on amazon.com under the title: "Social Power Constructs: Exploring Power Regularities in Self Advocacy and Empowerment".

Do I do things for others that they could do for themselves?

Naturally, in People First we want to ensure that Advisors are not doing things for people that they can learn to do for themselves. It can be hard to refuse a request to help, but we can put the need for self-reliance first and ask the PF member to start working on the task on their own. Let them know you will join them later. Sometimes you will find that they delay starting the task until you get there (in which case you can help get started and then slip away); but other times you will find they wave you away when you find time to return to them because they are succeeding all by themselves in accomplishing the task. Instead of feeling a bit hurt that you were not needed- you might feel a rush of pride that you did the right thing.

Why do I want to help others?

Many people feel compelled to help others because they recall a time that they needed help and did not get the help that they needed. It seems to relieve the hurt somehow, if we can provide something we never received to someone else. However, in People First groups the goal is for the Advisor to simply stand back and only give advice when asked. One of the skills an Advisor needs to develop is to stand back, let people learn, let people make mistakes, help people reflect and plan, and know when it is time to move on.

What is it that makes me want to help others?

Advisors can recognize the syndrome of 'over helping' if they feel anxious when watching people struggle to learn, make mistakes and have to start over, and (huge gasp) even fail. It is important to remember that the road to self-advocacy is a lonely one for each person. It is a road that no one can walk with, or for, another person. In fact, too much help simply keeps the person off the road to self-advocacy.

What do I most respect about myself?

Chances are that one of the things you most respect about yourself is your ability to take charge and get things done! This is the goal of self-advocacy. You probably most respect yourself for taking care of yourself and finding your way toward your goals. As an Advisor you want to help people step onto that road and begin to find their own path to self-advocacy. If your focus is too much on helping others, it may be time to set new goals for yourself and start that lonely walk forward again towards a new personal goal; while supporting through good advice, the lonely walk of the courageous and competent members of the People First group you advise.

Personal relationships in the group and relationships between groups

Advisors realize, by now, that they are not a member of the People First group and they do not have sanctioned personal relationships with members of the group. They should develop lasting professional relationships with the members and other advisors. They may, however, quite appropriately develop personal relationships with other advisors.

In most People First groups the members have relationships amongst themselves and with members of other People First groups. These interpersonal relationships can be healthy for the group as it keeps interest in the group very high. They can also be destructive if cliques develop. It is up to the Advisor to do training for the Officers and then assist the Officers in providing training for the members on relationships. All meetings should be run professionally, and as though there are no personal relationships between members of the group. Every member must have the chance to speak and weigh-in on every topic. Every member has the right to take training on any topic of interest to himself or herself, if it is offered to one, it must be offered to all. Every member has the right to offer training on a skill they possess, to others. Every member must be treated the same way by every Officer and the Advisor.

If the system doesn't work for every person, it is not working for anyone. No one is getting what they deserve from a PF group that does not believe that every member as valuable as every other member. We show people how much they are valued by including them and listening to, and thinking about, everything that people want to say.

What's in it for me as an Advisor?

Advising a People First group is an extraordinary opportunity to mentor professionals-in-the-making. Most Advisors find they are given an enthusiastic, energized, hopeful, hardworking, committed group of members who are eager to learn all the skills they can. This gives the Advisor a rare opportunity to mentor a group of people who have interest in building their skills as well as a commitment to use their skills to help others. As they reflect on their own performance in mentoring others, many Advisors find their own path forward becoming clearer. As one's past slips into focus, there is a wonderful new clarity about next steps and goals in our own lives.

Moving on after your term as an Advisor

Most advisors serve about seven years, or something in the nature of two three-year terms. During that time, Advisors have made many community contacts, government contacts, foundation contacts, and some disability specific contacts. Most people are hired for a new job due to being introduced to the position by someone they know, someone who realizes that they would bring energy, skills and enthusiasm to the new job. There is great respect for the People First program, and having served as an Advisor for some time, gives a person many new skills and abilities that will be greatly welcomed in other organizations. And, hey, every People First group needs trainers and volunteers!

5

Self-Advocacy is a Life Long Process

DEVELOPING SELF-ADVOCACY IS A LIFE-LONG PROCESS / KINDERGARTFEN, GRADE 1-3; GRADE 4-6: MIDDLE SCHOOL, HIGH SCHOOL, AGES 18-22, ADULT GROUPS ARE 22+.

Developing self-advocacy is a life-long process

Everyone needs to learn how to develop self-advocacy, but, perhaps, the need for a new vista of belief in one's self is greatest among people who live under multiple layers of decision-making designed to *re-mediate* or *re-habilitate* them. For these people who have a discredited reputation for inability to make decisions in their own lives; leadership development, communication skills, listening to others, learning to share goals and direct energy toward positive goals have become topics for training.

Training for self-determination should begin at the same time all formal education begins, and be a deeply embedded component of all educational plans. At the latest, self-determination training needs to begin in Kindergarten for people with disabilities and their families. This training may be targeted to each age level and should have direct tie-in to the Individual Education Plan (IEP) for each child.

Outside educators might well be the best teams to bring training modules to the children and their families, perhaps in 6-week units, each year. People First groups and Developmental Disability Councils may well provide the key experts for working with educators in developing these training modules. A quick look at the type of training that might be done at each age will be described, below.

Opportunities for students, kindergarten through twelfth grade are made possible through the School-to-Career system to prepare for life, post-secondary education and careers. The School District of Marshfield in Wisconsin has a framework for this system available on their website.

http://www.marshfield.k12.wi.us/schools/high/schoolcareerprograms.cfm

Kindergarten, Grade 1 -3

For children of this age, training in self-determination and self-advocacy would begin with a joyous exploration of the self; one's talents, strengths, and interests should be explored within a fun process of making a plan and carrying it out. Role-playing regarding barriers is interesting to this group, with conclusions leading to improved self-knowledge and enhanced belief in one's abilities. In addition, children and their parents should learn about the individual educational plan process and how they can ensure that the goals of learning and the recorded outcomes will promote their own goals as well as those of the teacher. This is all an early stage of school-to-career (STC) training.

Grade 4 – 6

In grades 4 to 6 children are able to work in teams. This is key to a healthy concept of oneself within a group. Stories, songs, arts activities, and creation of individual and group projects lead to self-awareness and a positive belief in one's own ability to enhance the group outcome are the goals. Knowledge and participation in the IEP process might be increased in this age to allow children an opportunity to establish sanctioned goals on the IEP and help develop strategies to reach them.

Middle School

Getting along with peers is a key goal in the middle school years. A circle of Friends may be a helpful tool to establish a strong social cadre and to promote positive self-imagery. Learning to vote and to support the majority decision are very important group skills and need to be developed along with individual planning goals and the development of the ability to find creative ways to meet one's personal goals and remove barriers to full participation.

High School

At this age, transition between stages and into adulthood begins in earnest in the school district, by federal mandate. Students of this age can Chair their own IEP planning process and with their parents and teachers, set goals for annual performance, and establish the key structures and supports they need to succeed. Selection of a career for which to train and establishing a life-long Micro-board with accountant, sounding-board, and several friends is now key.

Ages 18 – 22

The young adult is able to design projects, take part in planning, and demonstrate persistence to meet their personal goals. In the final years of state supported education the person should set high goals such as learning to type, learning how to do public speaking, learning to negotiate and earning a certificate that will assist the person in their upcoming work life.

Adult groups

Adult groups are the standard People First groups with which we are all familiar. If self-advocacy and project planning had been systematically and annually addressed with the person for the preceding 15 years, think of the knowledge, skills, and abilities from which they could springboard into adult life and roles of leadership. However, at present we are in a time period in which the younger adults with disabilities have had at least four years of school-based awareness training for self-determination and school to career transition. However, older adults with disabilities have a long and discouraging history of experience with a treatment system that limits assistance to those who abide by system constraints, such as not being allowed to hold a job- or losing insurance and monthly stipend, living where they are placed, and accepting the annual plan as it is designed for their treatment.

For these reasons younger persons may want a more training- based PF group. They may view People First as a springboard to great things, while older persons may want a support group. There is no reason that training cannot take place in a supportive environment, offering everyone the ability to belong to and be an active member of a self-advocacy training program.

6

Preparing the Chapter to Take Care of Business

SEEING THE MISSION STATEMENT, GOALS, OBJECTIVES, AND ACTIVITIES

PROGRAM EVALUATION AND BUDGETING / BYLAWS.

IT ALL STARTS WITH A MISSION STATEMENT

A **mission statement** is a statement of the purpose of a company, organization, or person; its reason for existing; a written declaration of an organization's core purpose and focus that normally remains unchanged over time. In Utah, the Mission Statement is created by elected and appointed persons who serve in People First of Utah (statewide organization). If you have not been given a Mission Statement, you will need to craft one.

Properly crafted mission statements (1) serve as filters to separate what is important from what is not, (2) clearly state which markets will be served and how they will be served. A mission is different from a vision in that the former is the cause and the latter is the effect; a mission is something to be accomplished whereas a vision is something to be pursued for that accomplishment. It also may be called company mission, corporate mission, or corporate purpose.[1]

The mission statement should guide the actions of the organization, spell out its overall goal, provide a path, and guide decision-making. It provides "the framework or context within which the company's strategies are formulated". It is like a goal for what the company wants to do for the world.[2]

1] "What is a mission statement? Definition and meaning". BusinessDictionary.com. Retrieved 4 February 2015.

[2] Hill, Charles; Jones, Gareth (2008). Strategic Management: An Integrated Approach (8th Revised edition). Mason, OH: South-Western Educational Publishing. p. 11. ISBN 978-0-618-89469-7.

A Mission Statement is key to a healthy and active organization. Without a mission statement, a group can lose focus, drift off course, and fail to accomplish its goals. It might be said that without a mission statement, the members may not even have the same goals in mind.

Creating a Mission Statement for a People First group will not be difficult, as there are many publically distributed Mission Statements. Local Chapters of a state use some the state People First Mission Statement to ensure that their goals remain connected to and supportive us the goals of the state People First organization. However, everyone needs to know how to create a Mission Statement so that they can be prepared to serve on the state board. A mission statement should be short, so everyone can remember it.

A good Mission Statement for a
People First Chapter could be as follows:

"At the heart of People First is our vision to be a tool for people to develop skills in advocacy, leadership, and community change; and to be most admired for our skilled membership, strong partnership ability, and effective performance."

This statement shows that while PF groups or chapters may sometimes raise funds, provide services, travel, or host dances- these activities are all related to the central goal of promoting personal and group skills in advocacy, leadership, and community change. This **Mission Statement** is carried out through a process of setting **Goals** that are directly related to the Mission Statement. **Objectives** that will lead to fulfillment of the Goals, and **Activities** that will effectively result in the successful completion of each Objective.

Sample objectives of People First could be
(your group can have several):

1. To remove barriers to full participation by people with disabilities.

2. To build personal skills among members, and strength as an organization, in using technology, obtaining leadership training, and carrying out executive functions that will improve community integration for people with disabilities.

3. To teach the community about the rights, abilities & strengths of people with disabilities.

GOALS AND OBJECTIVES OF PEOPLE FIRST

With our Mission Statement in place, we now have to meet to discuss the objectives that the People First group or chapter would like to develop. From the objectives will come our weekly and monthly activities. The objectives must be served by every activity. If people in the Chapter think of an activity that is not related to the Goal of the PF Chapter and is not an annual objective, then it should be set aside to be considered at the next annual plan.

GOALS

The goal of a People First Chapter is to ensure that every activity of the Chapter is directly related to achieving the Mission of the organization.

OBJECTIVES

Objectives are related to the Goal of the Chapter by giving the goal expression in terms of what PF members can actually work toward, on a monthly basis.

ACTIVITIES

From the Mission Statement, comes the chapter goal. From the chapter goal come the chapter objectives. From the objectives come the activities. Each is linked to the other. Annual performance on each level is objectively evaluated on an annual basis.

Sample activities linked to the Goal and
Mission Statement above might be as follows:

OBJECTIVE 1. To remove barriers to full participation by people with disabilities.

RELATED ACTIVITIES TO OBJECTIVE 1:

a. Study a survey or barriers to full participation and discuss them.
b. Determine which ones to work on. There may be individual goals and group goals in this area (as shown on the Sample Program, below.
c. Bring in resources and training to ensure effective use of time and effort.
d. Evaluate progress quarterly.

OBJECTIVE 2. To build personal skills among members and strengthen as an organization in using technology, obtaining leadership training, and carrying out executive functions that will improve community integration for people with disabilities.

RELATED ACTIVITIES TO OBJECTIVE 1:

a. Determine which types of skills should be worked on this year.
b. There may be individual goals and group goals in this area (as shown on the Sample Program, below.
c. Bring in resources and training to ensure effective use of time and effort.
d. Evaluate progress quarterly.

OBJECTIVE 3. To teach the community about the rights, abilities and strengths of people with disabilities.

RELATED ACTIVITIES TO OBJECTIVE 1:

a. Determine which types of community awareness or change should be worked on this year.
b. There may be individual goals and group goals in this area (as shown on the Sample Program, below.
c. Bring in resources and training to ensure effective use of time and effort.
d. Evaluate progress quarterly.

BYLAWS

Finally, Bylaws outline the way in which the People First Chapter will get its work done. The bylaws provide the rules and regulations under which the chapter will function. These are created and institutionalized by People First of Utah, but each chapter member will want to learn how to write them, so that they are prepared for service at the state or national level in the future.

> A **bylaw** is a rule adopted by an organization chiefly for the government of its members and the regulation of its affairs.
>
> *http://www.merriam-webster.com/*

The Mission Statement, Goal, Objectives, and Activities are all related to each other. This is illustrated in the pyramid-like graphic, below.

1. As you see, the **Mission Statement** is clear and concise. It usually consists of just one, rich, sentence.

2. **The Goal** is usually expressed fully in just a couple of sentences. It sets the standard of decision-making for programmatic activities.

3. **Objectives** may best be given as bullet points that can be used to determine which of all possible activities should be pursued by the group.

4. Finally, **the Bylaws** become the system rules under which the PF Chapter will live.

WHAT AN ADVISOR NEEDS TO OFFER

Advisors must have areas of expertise that they bring to the PF Chapter in a number of areas. If you think about it, the purpose of an Advisor is to create, host, and implement an infrastructure in which the People First Chapter can operate. Let's take trains as an example. No matter how "empowered" the engineer is, he or she cannot drive a train unless there is a train track and coal, diesel, or electricity for fuel. There have to be maps, warning systems, and government permissions. It is the same in People First. A well maintained and vibrant infrastructure is needed to support active and energetic PF groups.

The members and officers of the local PF Chapters rely upon the Advisor to be certified, arrange for government support, financial resources, business regularities and reports, and to know "their business" in terms of identifying need, and then arranging for training and materials, as they are needed. They count on the Advisor to know and follow state PF regulations. These areas of Advisor expertise are introduced below. Each area also has table to help new Advisors identify the steps in each process, and there are samples of each type of work offered in Appendix 1 to help get new Advisors started. Each part of the plan will be locally created and locally funded, and must be approved by the state office.

Each People First Chapter should have the following:

1. **A Barrier-Free Access Plan**
    a. For the Chapter
    b. For each individual

2. **A Training Plan**
    a. Training for the entire group
    b. Individualized training for each individual based upon personal goals

3. **A Technology Plan**
    a. Training and use of technology for the entire group
    b. Training and use of technology for each individual based upon personal goals
    c. Fundraising for any purchase of technology tools

4. **An Annual Evaluation Plan**
    a. A mission-based evaluation plan for the Chapter
    b. An individual evaluation outcome plan based on personal goals
    c. An outside Financial Audit of People First Chapter funds- this should occur at the organizational level and will not be required of individual chapters
    d. Public release of the evaluation report for the Chapter

5. **An Annual Meeting plan with schedule and expense budget** is organized by the Executive Board and the Executive Self-Advocacy Coordinator of the state organization in Utah, and the necessary information will be distributed to the chapters, but it is still a good idea to understand the components that considered when planning an annual meeting:

    a. Location on public transportation line
    b. Location with technology and access to resources
    c. Meeting schedule posted at the start of the year
    d. Annual Conference schedule and costs posted at start of the year
    e. Annual Training Plan posted at start of year for chapter and for individuals
    f. Annual plan to identify potential community resources and development

Each of the sections of the Annual Plan will be shown below in table format, with descriptions of the steps that might be taken to ensure that the goals are met. Links and resources will be given in the appendices. Each local Advisor, Member and Officer will want to learn about these sections of the plan so that they may take part in future planning over the coming years.

ANNUAL PLANNING GUIDE

1. A Barrier-Free Access Plan	
a. Barrier-Free Access Plan for the Chapter	**Steps:** 1. Review of national and state guidelines for PF Chapters and Best Practices in Community Access 2. Meeting with Officers to discuss. Prepare Officers to present the topic of Barrier Free access to members. 3. Members present the topic to members. Members discuss. 4. A list of Needs for access is created. 5. A list of persons to address each need is created. 6. Advisor is standing by to assist as requested. 7. Advisor prepares the Annual Plan for Barrier Free Access; and Officers distribute it. 8. The Annual Plan becomes one of the outcomes that will be audited by the program evaluator.
b. Barrier-Free Access Plan for each Individual	Steps: 1. Advisor prepares a handout for each member explaining their right to community access.

	2. Members may request meeting with Advisor to discuss and plan in private. 3. Advisor makes suggestions to members who do not request training. 4. Advisor facilitates access to needed tools or training for the members, in the community.
2. A Training Plan	
a. Training Plan for the Chapter	**Steps:** 1. Review of national and state guidelines for PF Chapters and Current Issues. 2. Meeting with Officers to discuss. Prepare Officers to present the topic to members. 3. Members present the topic to members. Members discuss. 4. A list of Chapter Needs for training is created. 5. A list of persons to address each need is created. 6. Advisor is standing by to assist as requested. 7. Advisor prepares the Annual Plan for training and Officers distribute it. 8. The Annual Plan becomes one of the outcomes that will be audited by the program evaluator.
b. Training Plan for Individuals based upon personal goals.	Steps: 1. Advisor prepares a handout for each member explaining their right to personal development training in

	their PF Chapter. 2. Members may request meeting with Advisor to discuss and plan in private. 3. Advisor makes suggestions to members who do not request training. 4. Advisor facilitates access to needed training for the members, in the PF Chapter or in the community.
3. A Technology Plan	
a. Training and use of technology for the entire group	Steps: 1. Review of national and state guidelines for PF Chapters and Current Issues. 2. Meeting with Officers to discuss. Prepare Officers to present the topic to members. 3. Members present the topic to members. Members discuss. 4. A list of Chapter Needs for training is created. 5. A list of persons to address each need is created. 6. Advisor is standing by to assist as requested. 7. Advisor prepares the Annual Plan for training and Officers distribute it. 8. The Annual Plan becomes one of the outcomes that will be audited by the program evaluator.

b. Training and use of technology for each individual based upon personal goals	Steps: 1. Advisor prepares a handout for each member explaining their right to personal development training in their PF Chapter. 2. Members may request meeting with Advisor to discuss and plan in private. 3. Advisor makes suggestions to members who do not request training. 4. Advisor facilitates access to needed training for the members, in the PF Chapter or in the community. 5. Progress of the Chapter is tracked for the Program Evaluation Report.
c. Purchase, rental or use of technology tools for each member of the group	Steps: 1. Each member has the right to assistance in planning for a way to obtain a technology tool that is related to their personal development plan. 2. Members request a private meeting with the Advisor to plan for purchase, rental or use of technology tools. 3. Progress is tracked for the annual evaluation, in aggregate format to conceal the identity of the members.
4. An Annual Evaluation Plan	
a. A mission-based annual evaluation plan. The evaluation process is developed by the Executive Board and will be shared with each	Steps: 1. Review of national guidelines for PF Chapters and Current Issues. 2. Meeting is held with Officers to discuss. Prepare Officers to present the topic to members.

chapter as well as what chapters are responsible to report back to the E. Board. It is still important to learn about this section of the plan so that one may take part in future planning over the coming years.	3. Members present the topic to members. Members discuss. 4. A list of potential evaluators is created. 5. A list of persons to prepare a short description of each potential evaluator is created. 6. Advisor is standing by to assist as requested. 7. The members discuss the potential evaluators and select one. 8. Officers send letter to evaluator. 9. Advisor and members work with the evaluator as requested by evaluator.
b. An individual annual personal goals	Steps: 1. Advisor facilitates access to needed training for the members, in the PF Chapter or in the community. 2. Progress of the Chapter is tracked for the Program Evaluation Report, never by name but only in aggregate.
c. An outside Financial Audit of People First Chapter funds. The audit process is the responsibility of the Executive Board. It is still important to learn about this section of the plan so that one may take part in future planning over the coming years. Chapters should submit a simple financial statement with their	Steps: 1. Review of national guidelines for PF Chapters and Current Issues. 2. Meeting is held with Officers to discuss. Prepare Officers to present the topic to members. 3. Members present the topic to members. Members discuss. 4. A list of potential financial auditors is created. 5. A list of persons to prepare a short description of each potential financial

annual report if the chapter has funds, but they do not need to hire a financial auditor.	auditor is created. 6. Advisor is standing by to assist as requested. 7. The members discuss the potential evaluators and select one. 8. Officers send letter to evaluator. 9. Advisor and members work with the evaluator as requested by evaluator.
d. Public release of the evaluation report for the Chapter	1. The financial auditor is to prepare the final report in such a manner and format as determined by the Program Evaluator, who will incorporate the financial audit into the Final Annual Report. This is all managed by the State Office. 2. This report is public.

5. An Annual Meeting plan with schedule and expense budget.	
In Utah, planning an annual meeting is the responsibility of the Executive Board with the help of the Executive Self-Advocacy Coordinator. Information about annual meetings will be distributed to the chapters.	
a. Location on public transportation line	Steps: 1. The Advisor finds several places that are offered at no cost, on a public transportation line, with barrier-free access and technology access. 2. The options are presented to the Officers who are assisted, if the Advisor is asked to assist, in preparing the presentation for the members. 3. The members discuss the locations and vote. Majority vote rules. 4. The Advisor works with the funding source, the location management, and PF President to obtain written

	agreement for the year. 5. If people state that they cannot transport to the meeting place, that becomes an item on their personal plan and the Advisor works with them, their team, circle of friends, and other resources to resolve.
b. Location with technology and access to resources	1. There must be access to a computer for any member who wants to use one. If there are fees for printing, the PF Treasurer works with the Advisor to place this as a line item on the budget. 2. If members want their own computers and smartphones, that becomes part of a personal plan.
c. Meeting schedule posted at the start of the year	1. After the meeting place is set, the meeting calendar is created by the Advisor and the Officer(s). 2. Meetings are posted online. 3. A Handout of meeting dates for the year is distributed to any interested persons. 4. A plan is made for a blast email prior to each scheduled meeting or to a phone tree to remind members of meetings. All members are on the list, no one is left off. Staff, community members, the location management, and others may request to be on the mailing list. 5. Faithful completion of this line item is reported on the Annual Program Evaluation.
d. Annual Conference schedule and costs posted at start of the	1. Advisor ensures that all Officers and Members know the date of the upcoming Annual State or National

year	Conference. 2. Officer leads the discussion with members regarding how much the conference will cost. 3. General discussion on raising funds as a group to attend the meeting. Groups should raise funds together and distribute them among those who worked on the fund raising activity. 4. Private discussion with member and Advisor on raising additional funds to attend. This is a year-long process. Start early. This process needs to be in the By-laws. Ensure that they are up to date each year, as a Best Practice.
e. Annual Training Plan posted at start of year for Chapter and for Individuals	The Annual Training Plan is handed over to the Program Evaluator at the start of the year and will be evaluated quarterly.
f. Annual Budget is created and vetted.	The Annual Budget is handed over to the Financial Auditor and the Program Evaluator at the start of the year and will be evaluated quarterly. Bank Statements, Funds expended, and other items may be required by the financial auditor. Be sure to know what records you must keep at the start of the year.
g. Annual plan is created to identify potential community resources and development	1. Review of national guidelines for PF Chapters and Current Issues. 2. Meeting with Officers to discuss development of funds. Prepare Officers to present the topic to members. 3. Members present the topic to members. Members discuss. 4. A list of Chapter Needs for

	operations money is created. 5. A list of persons to address each line item is created. 6. Advisor is standing by to assist as requested. 7. Advisor prepares the Annual Plan for funding and Officers distribute it to members. It is voted upon after discussion. 8. The funding and operations budget becomes one of the outcomes that will be audited by the financial auditor and handed over to the program evaluator.

WORKING WITH OFFICERS AND MEMBERS

People First Advisors are professionals, not members of the People First group or chapter. Advisors are similar to mentors in that they don't do things for the person they are mentoring, they simply act as a sounding board, help find resources, arrange for training or provide training, and then help with any follow up as needed. If asked to help.

People First Advisors should sit in a chair beside the wall, not at the table with People First members. They should listen carefully and be prepared to offer assistance when asked.

Advisors are cheerful, believe in the talents, abilities, and skills of the People First members, and enjoy the differences between people. They have enthusiasm, energy, and are kind.

Advisors should take the coursework offered to become a Certified Advisor, because there is so much to learn about how to support People First Chapters in their work.

FOR THE NEW PEOPLE FIRST ADVISOR. WHAT TO DO FIRST?

The central work of a PF Advisor is to keep the Mission of the organization clearly in mind. Nothing should be done in the Chapter that does not fit the Mission. If the **Goal, Annual Objectives, and Annual Activities and Budget** are not yet set, that is the first order of business. Check with the state office and ask for anything they have set up for all chapters or groups to use. Remember as you begin, that as much work as is possible should be done by the People First members and Officers, with your help when they ask for it. Their goals are to develop their skills, leadership abilities, and learn how to create the kind of community that is barrier-free for all members of society.

Working alone this could take a long time, maybe more than a lifetime. However, when people work in teams that are all members of a type of Association –they find that they take on the strengths of the many hands that are all working jointly towards the same goal.

SET UP A PEER ADVISOR GROUP

Many advisors do feel that they are working alone and are isolated. When they are not sure how to manage a situation or when they are in need of new ideas, they don't know where to turn. Many are volunteers – helping People First groups on their own. Others are employed and the task of working with PF members is assigned to them as part of their regular job. Either way, many advisors report that they feel disconnected with other chapters and other advisors except upon occasions when they attend state or national conferences.

It is better for everyone if advisors have a peer group. The peer group of advisors in a state will have a lot in common. They share many of the same concerns, they live under many of the same conditions and they may seek many of the same types of growth for their groups. Advisors can share contacts, relationships with state partners, and help each other figure out what to do when they face problems in the group, or with funding, or simply want to expand their knowledge. Some advisor peer groups read the same books or watch the same films, then discuss the ideas presented in the materials. Other advisors meet monthly through Skype, which is offered at no cost, or other teleconferencing if they all work for an agency that offers that web conferencing.

A peer group is a great resource to have when advisors need information and suggestions for managing situations. In a peer group, more experienced advisors are there with the help they need. While experienced advisors may offer things they have learned over time, the long-standing advisors need new ideas, fresh perspectives and high energy, which is a gift of that the new advisor brings. For this reason, many states require incoming advisors to serve as "Assistant Advisors" to experienced advisors for six months. After that period, when the new advisor establishes a new PF Chapter, the advisors become Peer Advisors for each other (and all other advisors available) so that they can continue to bounce ideas off of each other, seek new information and relationships with the community, and build a successful, large, and stable statewide People First community. Hanging out with other advisors is fun, too!

FIND TRAINING

Part of being a good advisor is to continually seek personal growth and development as a resource person for the People First Chapter that engaged the advisor. A key role for an advisor is to know where to find resources, how to do things that need to be done, and to become skilled at bringing out the best in other people. It takes time and effort to grow into the type of person who can do these things.

Some effort every week should go into seeking community resources that the group may one day need. The advisor should identify what type of organization or agency may print in Braille (library, university, School for the Blind....). Yes, it may not be needed today- but one day it will be needed and if the advisor has sought out the information ahead of time, made contact with the group and found out how the process of printing is managed, then the advisor is prepared. The same goes for training in Public Speaking, Word and PowerPoint classes or training, printing and binding services offered at a lower cost for non-profit groups (or free from a 'sister' agency such as The Disability Law Center or the Utah State University Center for Persons with Disabilities). What about renting large vans? How about motivational speakers who might inspire the PF Chapter members? Do you know where to find information on fund raising for groups, or potential work that the PF Chapter members can do to raise funds for their group? Can you share what you know with other advisors? Being prepared is key. The advisor should have a resource notebook that is added to each time a new resource is identified. Identifying new resources is an ongoing task.

GET TO KNOW THE OFFICERS

The People First community runs on relationships. Everyone who wants to be part of the community is welcomed, because everyone has something to offer, personal strengths that will build the community strength, and abilities and skills that will contribute to the growth of the self-advocacy movement. The officers are selected by their peers, and the PF group is counting on them to lead the way. Many officers will be new and ask for lots of help when getting started. Even officers with years of experience will ask for training and advice to help them meet the demands of their position more effectively. Whatever else you do- don't conduct training 'part-way'. Go the distance.

The advisor who takes the time and makes the effort to really know the officers as individuals will reap the benefits- and so will the whole group. It takes time and knowledge of the person to understand when to gently push an officer into reaching for new skills and it takes good humor and kindness on everyone's part to deal with the situations that arise from a new officer climbing up a steep learning curve.

The entire PF group benefits when the officers and the advisors are able to work well together, when communication lines are open, and when both are able to complement the work of the other as they move toward the same goal.

Some officers and advisors meet monthly between PF meetings to plan, take part in training, and grow comfortable with each other. Some advisors report that they are aware that members and officers alike take any comment they make as 'law'. Getting to know each other, sharing 'off-duty' time after the training to relax and enjoy each other, and talking things out as equals goes a long way towards making the entire group function more efficiently. If the advisor shares his or her schedule with the officers, letting them know in advance when a good time to text or call might be, it will go a long way towards helping officers know when they won't be intruding- and letting the advisor focus on other work without interruption. The same is true for the officers and members. They are not available 24/7 to talk with the advisor, either. So if both sides work out a calendar for meetings, free-times, and busy-times, it makes communication worry free. Open communication between officers and advisors will make all the difference to the whole community.

GET TO KNOW THE COMMUNITY

It is nice when new advisors arise out of the disability community. When they do, they bring their relationships, knowledge of the community and their skills with them. However, that is often not the case. Therefore, the new advisor needs to learn how to seek information about the community and get to know both the agencies and the people who work in them. Some ideas include exploring what the Park District has to offer, a nearby National Park, the Disability Agencies (the state Developmental Disabilities Council, the

University disability services and University Center for Excellence in Developmental Disability, Independent Living agencies, Group Homes and Workshops, Protection and Advocacy, the public transportation system, the public libraries, the local Rotary and Toastmasters, local schools and special interest groups that are located in the vicinity. Start a large three-ring binder. Make sections in the binder for each different type of information: draft document styles (agendas, bylaws), sections for working with people (how to conduct a business phone call, how to make an introduction for a speaker at a conference), and another for local, state, regional, and national contacts. Work on adding new material to the binder every month.

GET TO KNOW THE OTHER PEOPLE FIRST GROUPS IN THE STATE

There is a tremendous power that comes from working together. When officers from various PF Chapters across the state meet or talk together regularly, great things happen. The PF chapters are not in competition with each other, they are partners in teaching community collaboration and community advocacy to new members, and partners in working with legislators to write or amend laws that will extend access to the community and make it possible for the lives of people with disabilities to unfold and develop in full. Officers, members and advisors all need to work on building relationships and collaborating with other PF groups in the state, and region. There is strength in numbers.

LEARN ABOUT THE SYSTEM OF SERVICES AND SUPPORTS

The system of services and supports is rather complex. It was designed over a period of many years, it has many agencies, levels, and different organizations who overlap in services and who create a web of regulations. Since most PF members use services at some level, it is a good idea for advisors to understand how the system works. It might be helpful if the advisor would start a diagram of agencies and draw links between them. Many are funded through Congress. Over time, different legislations have been passed that are linked to money (or not linked to money) by the decision of the Appropriations Committee of the US Senate. Some local agencies are directly funded by these laws, and others are off shoots from a federally funded organization. Still others are state funded, through application. While advisors never have to take action at the behest of a PF member, it is a good idea to understand what is happening and why. It is also helpful to the advisor to learn which agencies might be interested in funding PF activities, conferences, or training.

POST THE MISSION STATEMENT, GOALS, AND OBJECTIVES

The PF Chapter will want to have a social media presence. Facebook and Twitter are offered at no cost. Chapters should contact the Executive Board if they wish to have information specific to their chapter on the People First of Utah website. However it is done, PF Chapters need to be visible so that other potential members can find them and join- and so that potential funding agencies can learn about them during the decision-making process.

When you create the social media presence, the key information to present is the Mission Statement of the PF Chapter, its goals, and its objectives. You can put in activities, various pictures or training materials or blogs, and highlight recent activities. What I always keep in mind when creating materials for PF is that it sends the message that "these are interesting people doing something interesting" AND "they seem nice. I would like to work with them."

KEEP ALL ACTIVITIES RELATED TO THE MISSION AND GOAL

As you can see from the information presented in the Advisor Handbook, it is clearly mandatory to keep all PF activities related to the mission and the goal. PF is about training people in self-advocacy, it is about helping self-advocates gain experience and training that they need to remove barriers to full participation in the community. If there are soccer games- they should only be held to raise funds for the organization's training efforts. If there are dances, dog-washes, yard sales, or other activities, it should be clearly stated that they are for raising funds to allow PF members to advance their training and take part in the great work of helping others learn to be self-advocates.

Most of the activities to be planned by PF chapters are expected to be related to the advancement of members to community leadership positions. PF is best served by efforts made to help PF members become proficient at the same skills used in other organizations: grant-writing, conference speaking, meeting with lawmakers, voting and citizenship, helping others, teaching about self-advocacy, and other community based activities that advance the mission of People First.

APPENDICES

Hopefully Helpful Handouts

Appendix 1

How To…

Agenda Templates, How to Advise Officers as They Run A Meeting, Annual Planning, links and resources. Information on potential types of personal plans (including savings plans, technology training, education plans, leadership training plan, Public Speaking training, Apprenticeship, Job Shadow planning, or Mentoring Training

How to Run a Meeting

Robert's Rules for meetings are used. http://robertsrules.com/
In general, the standard is for the President to create the Agenda ahead of time. It is distributed at the meeting and the President leads the group through the agenda topics. Including asking the group if there is anything that needs to be added under "New Business" before starting the meeting. People speak- one at a time- as they are recognized by the President. The advisor does not sit at the table with the members, but sits nearby and is ready to assist the President or any member if asked to do so.

Agenda

March 3, 2017 2 PM

Upcoming meetings for the month:

TUESDAY, MARCH 10, 2015; 2 PM

MARCH 17

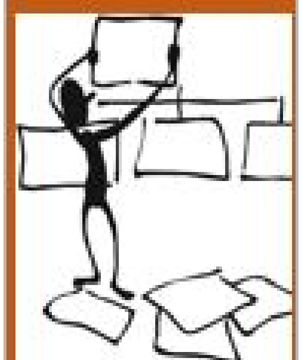
MARCH 24

MARCH 31

Greetings

Introductions

Everyone says their name and explains what they hope to accomplish today.



Topic 1

Tanya will explain the 4 resources we will look at together as we figure out the chapters and ideas the manual needs to have in it.

Topic 2

Everyone will make suggestions about what else we need to do, or to learn, before we write the manual.

Review and Next Steps

Everyone will leave with "homework" to do before our next meeting. Tanya will send an email to remind everyone.

How to Do Annual Planning

While in Utah most of the planning is done at the state level, everyone needs to be trained in the process, so that they can sit on the planning board in the future.

http://www.intrac.org/data/files/resources/729/Strategic-Planning-A-PLP-Toolkit-INTRAC.pdf

http://www.nonprofitaccountingbasics.org/reporting-operations/statement-financial-activities

How to Do Personal Plans

In doing **personal strategic planning**, the first thing you want to think about is increasing your personal "return on energy," rather than return on equity. You need to realize that the most essential and valuable thing that you have to bring to your life and to your work is your ability to think, to act and to get results. Your earning ability—which is a function of your education, knowledge, experience and talents—is your human capital, or your equity. And the way you develop your personal skills and use your earning ability will largely determine the quality and quantity of your rewards, both material and psychological, both tangible and intangible.

Action Plan Step 1: Clarify Your Values

This first part of personal strategic planning is called "values clarification." You ask yourself, "What values and virtues do I most admire and wish to practice in my life?" If you wanted to discover your strengths and personal skills in the work world, first you would define your values as they apply to employment. The values that companies settle upon would be similar to the values that you organize your work life around. Often, both companies and individuals will choose values such as integrity, quality, respect for others, service, profitability, innovation, entrepreneurship, market leadership, and so on.

In a similar vein, you could use those values to define your position with regard to your work. In your personal strategic planning, you could decide to plan your work life around the values of quality, excellence, service, profitability, and innovation. There are dozens of values that you can pick from, but whichever you choose, and the order of priority you place on your choices, will determine your approach to your work.

Action Plan Step 2: Create Your Personal Mission Statement

Your next step is to create your personal mission statement. This is a clear, written description of the person you intend to be in your work life. I have often found that this is even more important than setting specific financial or business or sales goals. Once you have decided how much you want to earn, you need to write out a **personal mission statement** that describes the kind of person you intend to become in order to earn that amount of money.

Remember: Your goal is to identify your personal skills and strengths so that you can deploy yourself in such a way as to increase your personal return on energy. In personal strategic planning, one of the best mental techniques that you can use to develop your personal skills is to see yourself as a "bundle of resources" that can be applied in a variety of directions to achieve a variety of objectives. As a bundle of resources, the amount of time and energy that you have is limited; therefore, your time and energy must be put to their highest and best use. Stand back and imagine that you're looking at yourself objectively, as if through the eyes of another person, and you're thinking about how you could apply yourself to bring about the best results. See yourself as your own employer or boss. What could you do to maximize the output of which you're capable, and where could you do it?

Action Plan Step 3: Perform an Audit to Strengthen Personal Skills

Once you have defined your values and written out your mission statement, the next step of personal strategic planning is to do what is called a "situational analysis." Sometimes we call it a "performance audit." This is the process of analyzing yourself thoroughly before you begin setting specific goals and planning certain activities. You begin your performance audit by asking yourself some key questions.

One of those questions should be, "What are my marketable skills?" Think about it. What can you do for which someone else will pay you? What can you do particularly well? What can you do better than others? What have you done particularly well in the past?

A wage or a salary is merely an amount of money that is paid to purchase a certain quality and quantity of labor or output. The results that you're able to get by applying your **personal skills and strengths** largely determine your rewards in life. If you wish to increase the quality and quantity of your rewards, you have to increase your ability to achieve more and better results. It's very simple.

Action Plan Step 4: Determine Your Area of Excellence

Finally, in personal strategic planning, the aim is always to achieve leadership in your chosen market niche. Business leaders have the authority to determine the area of excellence in their business. Analogously, on a personal level, you can choose the thing at which you're going to become absolutely excellent and achieve extraordinary results. So in what areas are you going to work to achieve results that are far beyond what the average person could be expected to accomplish?

Public Speaking Training

http://managementhelp.org/communicationsskills/public-speaking.htm
http://www.toastmasters.org/

Apprenticeships, Job Shadowing, Mentor Training

By Caroline M.L. Potter, Yahoo!
http://career-advice.monster.com/career-development/changing-careers/the-job-shadow-knows-try-on-a-career-before-you-commit-hot-jobs/article.aspx

Dreaming of pursuing a new career?
Take a step closer to making it a reality through job shadowing.

"Job shadowing is a great way to get a sense of what it's truly like working at a specific job," says certified career coach Hallie Crawford. "There's no way to be 100 percent sure you're going to fit into a position until you've actually tried it -- and shadowing or volunteering is as close as you can get."

Job shadowing involves following, or shadowing, a professional throughout a workday (or work week) to get a close look at what a particular job involves. It's an ideal way to determine if you might really be cut out for a career -- or not. You may have always wanted to work as a chef only to spend a workday with one and learn that you don't enjoying being on your feet all day. Conversely, you may find that you enjoy the excitement and interaction that you witness while shadowing a seasoned sales professional.

It's a Good Time

While students and recent graduates have long embraced job shadowing, Crawford, author of Flying Solo: Career Transition Tips for Singles, says everyone should consider job shadowing, especially in this economy. "You have to be more assertive than ever with your career, and asking for the opportunity to shadow someone is a way to not only learn what that job is like, but to expand your network as well," she says.

Crawford, who is based in Atlanta, notes that certain industries lend themselves well to job shadowing, including medicine and law. However, you can usually plan a job shadow for any kind of job. A local college career center, Monster.com, or the local chamber of commerce can all be instrumental in helping to arrange a job shadow if your immediate network doesn't yield any possibilities.

What You Should Do

Before you show up for your shadowing assignment, do a little homework to make the most of it. Research the company, its competitors, the industry and the position of the person you're tailing so you have a context for your new experiences. Come prepared to merely observe, but be ready to roll up your sleeves and work as well.

Ask to spend the last few minutes of your day reviewing your experiences with the person you're shadowing and getting answers to questions you may have. Solicit feedback as well.

Be sure to thank your job-shadow host, either over email or with a handwritten note. Make every effort to maintain your new contact as an active member of your network. You may even ask her to help you pursue additional job-shadowing opportunities within the industry so you have the broadest picture possible of the profession.

While job shadowing is essential when planning a career switch, it probably won't answer every question or banish any doubt you may have. "You have to do the work required to determine if a job is the right fit, but after that, you have to go with your gut and decide whether to dive in," Crawford says.

Appendix 2

By-Laws Sample.
Program Evaluation Sample.
Grant Writing Sample.

CONTENT LIST FOR CREATING BYLAWS- Chapters will follow the official bylaws issued and determined by the Executive Board for People First of Utah. The information is provided to assist Advisors, Members, and Officers in preparing themselves to participate at the state level.

1. A Barrier-Free Access Plan

a. For the Chapter
b. For each individual

2. A Training Plan

a. Training for the entire group
b. Individualized training for each individual based upon personal goals

3. A Technology Plan

a. Training and use of technology for the entire group
b. Training and use of technology for each individual based upon personal goals
c. Access to technology (purchase, library, college etc.) for PF members

4. An Annual Evaluation Plan

a. A mission-based evaluation plan for the Chapter. (This will come from the State office, in Utah.)
b. An individual evaluation outcome plan based on personal goals
c. An outside Financial Audit of People First Chapter funds- this will be

done by the State office in Utah. However, if the Chapter has funds to report, it is important that a brief financial statement be submitted with the annual chapter report to the State People First of Utah office.

d. Public release of the evaluation report for the Chapter

5. An Annual Meeting plan with schedule and expense budget

a. Location on public transportation line

b. Location with technology and access to resources

c. Meeting schedule posted at the start of the year

d. Annual Conference schedule and costs posted at start of the year

e. Annual Training Plan posted at start of year for Chapter and for Individuals

f. Annual plan to identify potential community resources and development

SAMPLE GRANT

http://grantspace.org/tools/sample-documents

GRANT FUNDING AGENCIES

http://foundationcenter.org/getstarted/topical/disabilities.html

SAMPLE PROGRAM EVALUATION

http://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/evaluation-plan/examples

Appendix 3

People First of Utah Contacts, Sample Projects for People First Chapters, Partners in Policy Making

People First of Utah Contacts

155 South 300 West, Suite 100
Salt Lake City, Utah 84101
Phone: 801-533-3965

WEBSITE: www.peoplefirstofutah.org
EMAIL: peoplefirstofutah@gmail.com

Sample Projects for People First Chapters

- Participating in creating training webinars
- Participating in writing training manuals
- Giving workshops at conferences
- Giving training to other PF Chapters
- Working with the Utah Developmental Disabilities Council on legislative issues

Partners in Policymaking:

http://www.wrightslaw.com/info/advo.partners.policymakng.htm

http://mn.gov/mnddc/pipm/

http://www.vaboard.org/policymaking.htm

Circle of Friends:
http://www.circleofriends.org/

National Gateway to Self-determination:

Self-determination is a national training initiative supported by the Administration on Intellectual and Developmental Disabilities. The National Gateway has resources available for both self-advocates and professionals to encourage self-determination.

http://www.ngsd.org/

SECTION 3

Sample By-Laws 2015

PEOPLE FIRST OF UTAH BY-LAWS

- Our name is PEOPLE FIRST OF UTAH
- Our members are each People First group in Utah, USA.

What we do:

- Learn about Self-advocacy.
- Teach others about Self-advocacy.
- Work on laws that affect people with disabilities.
- Promote equality for people labeled with disabilities.

Membership

- Members must show a commitment to the goals of People Frist of Utah.
- There must be a current membership list for each chapter in the provincial office. A separate private file will list the medications and next of Kin for each member who travels with People First of Utah.
- Voting members are members of the local groups who have been labelled with a disability, or have used the services for people who have been labelled such as by schools, vocational centers, group homes, following IPP in education system, or disability employment programs.
- Voting members must be 18 years of age or over.
- Voting members of the state board are the Presidents of each local group.
- Non-voting members are junior members between the ages of 12-17 years.
- Members must agree to follow the bylaws and the Regulatory Addendums of the By Laws.

If someone wants to join People First of Utah from an area where there is no local group, the Executive Officers can vote to have that person become a member. That member, with the support of People First of Utah, will be encouraged to start a local group and given training to help them get started.

To Become a Member of People First of Utah:

1. A local group must follow the State of Utah by-laws.
2. A local group must have a meeting a minimum of three (3) times a year.
3. A member of a local group is considered an active member if they attend the majority of regular chapter meetings that year.

4. A local group will provide reports to the State Board Meetings and to the Utah Developmental Disability Council.
5. The local group's appointed board member must attend a minimum of one State Board Meeting per year.
6. A local group must have four elected officers and an Advisor, to be elected every two years.
7. Advisors serve a term of three years. They are encouraged to sign another three-year contract at the conclusion of each term.
8. Officers serve a two-year term and stay on board as trainers for the newly elected member who takes their place for six months.
9. A local group and its members must follow the goals of People First of Utah.

If a group fails to follow the goals of People First of Utah, that group's membership may be discontinued by a 75% majority vote of members present at an Annual Statewide meeting.

Officers or the Executive Board

- Executive Committee have the authority to:
- Take care of the business of People First of Utah between general meetings and may hold private meetings with the Advisor as needed;
- Spend money and to make sure the spending of money is within the approved budget; while keeping public records of all expenses
- To meet the objectives of PEOPLE FIRST OF UTAH and PEOPLE FIRST OF UTAH may request and obtain gifts, donations, and funding of any kind. Public Records will be kept of all income and expenses.
- An Annual Program Evaluation will be held showing all activities, income, expenses, financial audit, and programmatic outcomes. This

report will be posted on the website and will be provided at no cost to each donor who requests one.

- Any contract, document, or any other material that requires the signature of PEOPLE FIRST OF UTAH may be signed by any two Executive members AND the Advisor. The Executive Board may appoint other members or advisors to be additional signers.
- People First of Utah may not borrow money nor make financial donations without a specific board meeting and approval of the State Funding Source.

The Executive Board

The Board of Directors will consist of the State Executive and the President of each local group, along with a selection of up to three additional professional persons related through funding or training, and one community member. If the President of a local group holds a provincial Executive position, then an alternative Director may be appointed by that local group. The Executive of People First shall be as follows:

- President
- Past-President, for a continued six months term
- Vice-President
- Secretary
- Treasurer
- DD Council representative
- Training or Funding Representative
- Community Member at Large
- The President will run all meetings of PEOPLE FIRST OF UTAH. The President will make sure the work of PEOPLE FIRST OF UTAH is being done.

- The Past-President will chair the nominating committee, will attend PEOPLE FIRST OF UTAH Board meetings, and will share experience with the Executive whenever necessary.
- The Vice-President will assist the President, and will perform the duties of the President if the President is unable.
- The Secretary will read minutes of meetings.
- The Treasurer will read the financial reports at the meetings and present the budget.
- The Executive the authority to carry on the business of PEOPLE FIRST OF UTAH in-between board meetings. The Executive will carry out the business of the organization only subject to Board approval.
- A leadership Ad hoc committee may be formed to plan for training opportunities for the membership and community, with Advisor support. This committee may consist of senior members of PEOPLE FIRST OF UTAH who have served on the board for no less than ten years.

Any member of the Executive may resign in writing to the Board. The Board may by a simple majority of the votes remove any director. If an Executive position becomes vacant, the membership shall appoint a new director at a Statewide meeting.

State Advisor

- Must be certified and credentialed by the Utah DD Council following a background check, an 80% score on the Advisor training exam, and an invitation from the Executive Board.
- Must follow all of the goals of PEOPLE FIRST OF UTAH

- Support Board and its work – if unable set alternate, with input from Executive committee.
- Must attend all PEOPLE FIRST OF UTAH Board meetings- or select alternate, with input from Executive committee.
- Work as a team with a cadre of Peer Advisors.
- When there is an issue that the Advisor cannot resolve, the Advisor may discuss the issue with the Executive Board, the Peer Advisors, and then the Utah Developmental Disabilities Council.
- Appointment of the provincial Advisor will be set every two years by a vote of the Executive Board following an interview process, background check, approval of training certificates and due election by at least a simple majority.
- In accordance with protections for minors and vulnerable populations, any unresolved complaints against an Advisor that the Advisor has broken a law or acted unethically will result in the immediate dismissal, *without delay*, to protect vulnerable persons. No legal charge will be brought unless there is reasonable proof of guilt, but the dismissal will be without recourse, regardless of any such proofs.

Primary or Certified Advisors

- Must be certified and credentialed by the Utah Developmental Disabilities Council following a background check, an 80% score on the Advisor training exam, and an invitation from the Executive Board.
- Must follow all the goals of PEOPLE FIRST OF UTAH
- Support their local chapter and its work
- Must attend at least one PEOPLE FIRST OF UTAH board meeting a year

- Work as a team with provincial advisor, other advisors, the People First of Utah Executive Self-Advocacy Coordinator, Utah Developmental Disabilities Council, the national group if so certified, and the appointed Peer Advisors. Appointment of the Advisor will be set every two years by a vote of the Chapter members, with election by a simple majority, and after approval by the People First of Utah Executive Self-Advocacy Coordinator.
- If an Advisor is found to need additional training by the members, officers or peer advisor groups, the Advisor has 3 months in which to take the training and demonstrate the new knowledge or go on a mandatory leave until the training has been completed.

Staff

- Staff and Assistant Advisors must follow the goals, regulatory addendums, and guidelines of PEOPLE FIRST OF UTAH.
- Their role is to support all members, the Board and the Executive and all committees in their work
- Assist with all PEOPLE FIRST OF UTAH work
- The staff will take all board minutes if requested by the elected Secretary, and assist in typing and distribution.
- Must attend all PEOPLE FIRST OF UTAH board meetings, or send alternate, with the input of the Executive committee
- Staff are supervised by the executive, represented on a daily basis by the President, and the Advisor
- Work as a team with Advisor(s)

Meetings

- Meetings of the Executive Officers may be held at any time and at any place with ten (10) day notice and at least three times a year.
- Notice must be sent in writing or by phone to each officer.
- Preparation of minutes, all books, records, and minutes of all meetings of PEOPLE FIRST OF UTAH and of the Officers shall be the responsibility of the Staff, and shall be kept at the PEOPLE FIRST OF UTAH office.
- Members of the oversight committee, requested to attend meetings, will be reimbursed for their reasonable expenses.
- The books and records of PEOPLE FIRST OF UTAH may be inspected by any member within two (2) days' notice prior to the Annual General Meeting at the office of PEOPLE FIRST OF UTAH. All records are public and available upon request.
- Members of the Executive may not be related by blood or marriage.
- No Advisor shall have a relative by blood or marriage in the same People First group.
- When traveling on PEOPLE FIRST OF UTAH business, all members will have signed a prepared form that documents next of kin, medications in use, medical or health threats, and a financial agreement. The traveling members will sign an agreement along with guardians that anyone breaking a law, refusing to take medication, refusing to follow doctor orders, acting aggressively or in any other way endangering himself or herself and/ or others, will be sent home at the expense of the guardian. The guardian must personally come to the meeting and take charge of the member within 5 hours of notification. Any additional

fees related to the issue will be reimbursed to the PEOPLE FIRST OF UTAH fund by the guardian.

- No member may travel without a family member or a designated staff person (at the expense of the member) if the member has been aggressive, non-cooperative, or exhibiting other dangerous behavior within 9 months of the event.
- There are to be no cliques or exclusive groups of members at any event to which the members travel. All People First members are welcome in any group in which there are other People First members, without exception. No one is to be excluded or left out in any way.
- If members must borrow funds from the Advisor or from PEOPLE FIRST OF UTAH, they must repay the funds at the next meeting, if not before.

Elections

- President, Vice President, Secretary, and Treasurer (Executives) will be elected once every two (2) years at an Annual General Meeting by simple majority. President and Secretary Elections are held on odd years and Vice President and Treasurer Elections held on even years.
- The President and the Past-President shall appoint a nominating committee of three (3) members and the Past- President, at least two (2) months before the elections.
- The committee will be chaired by the Past-President. The committee will prepare a list of candidates for each position.
- Candidates must have sat on the provincial Board. All nominations will go to the nominating committee.

- *An Executive member is eligible to hold the same position for two (2) full consecutive terms.*
- An Executive member must be out of office for at least four (4) years before he/she can hold the same position again.

Statewide Meetings / Regional Meetings

The annual or any other meeting will be held at a time and place to be determined by the Board of Directors. At any annual meeting, in addition to any other business, the following will be received:

1. The Report of the President
2. Financial statements
3. The Auditor's Report
4. The Budget
5. Auditor for next year
6. Quality Assurance Discussion of past year performance and Best Practice ideals of the coming year.

- The members of PEOPLE FIRST OF UTAH will be able to consider and conduct any business of People First at this meeting.
- The Board of Directors or the President have the power to call a general meeting of the members of PEOPLE FIRST OF UTAH at any time, *but (10) days written notice must be given to the members prior to any annual or special meeting.*
- At meetings, there MUST be a majority (51 percent) of the members entitled to vote.
- At all meetings of members of PEOPLE FIRST OF UTAH, every decision will be determined by a majority vote unless otherwise provided for in these by-laws.

- At the Annual General Meeting, each group will have one (1) vote. A voting member may appoint another member to attend and act on their behalf at any meeting.

Financial

- Unless otherwise ordered by the Board of Directors, the official year-end of PEOPLE FIRST OF UTAH will be September 30.
- The staff and president/Executive will see that all necessary books and records of People First required by the by-laws or any applicable law are regularly and properly kept. Each Advisor is responsible for taking an annual training offered by the Utah Developmental Disabilities Council and passing the exam with 80% or higher score. Each Advisor is responsible for following all federal, state, and local laws regarding vulnerable persons and minors.
- An audit will be done annually. The report will be made public within 60 days.

Bylaw Changes

- The by-laws of the PEOPLE FIRST OF UTAH may be changed by a special resolution at a Statewide Meeting, and approved with at least three-quarters (3/4) of the members.
- Notice of the by-law changes need to be given at least two (2) months prior to the meeting.
- Regulatory Addendums may only be added by statewide voting, in accordance with the same rules as any other by-law change.

Appendix 4

Books and Film Suggestions for Advisors

Utah Developmental Disabilities Council Training Materials and Webinars
www.utahddcouncil.org
www.peoplefirstofutah.org

National Disability Leadership Alliance
http://www.disabilityleadership.org/index.php?option=com_content&view=article&id=10&Itemid=2

Board Resource Center
http://brcenter.org/ab_believe.html

Welcome Change Productions
http://www.welcomechange.org/

Toolkit for People First Advisors Series:

1. **Advisor Training Webinars**
   www.utahddcouncil.org
   www.peoplefirstofutah.org
    a. Supporting the Group
    b. Nurturing Independence
    c. Transportation

2. **Advisor Training Handbook:** Handbook of Advice for the Advisor from People First Members and their Friends.

3. **Book Club Recommendation:**

- Social Power Constructs: Guidebook for Recognizing Power Regularities in Self-Advocacy & Empowerment. By Tanya D Whitehead, PhD.

- Disability Accommodations at School and Work: A Person Centered Guidebook. By Tanya D Whitehead, PhD.

- Riding The Bus With My Sister (author, Rachel Simon)

http://www.hachettebookgroup.com/titles/rachel-simon/riding-the-bus-with-my-sister/9781455526161/#desc

A Note to the Reader!

Advisors! Members! Find other resources and share them with other groups by posting good resources on the People First of Utah website; and by talking with each other on a regular basis.

Create and USE a peer group!

Keep up the great work, everyone!

- Tanya