

# BOARDSMANSHIP

## Inclusive and Accessible

**Membership**



**Decision Making**

**Success**



# 1 INTRODUCTION



## From our Executive Director

Today self-advocates in California have the opportunity to serve on local, state, and national boards. We are making a difference on policies that affect us and creating opportunities for people to have a voice.

*Joe Meadows*

Executive Director, People First of California



“To be an advocate for all, training will encourage Self-Advocates to realize what they can contribute, what they need to be a participating board member, and how to provide their unique perspectives and concerns.”

*Michael Cooke*

President



**People First of California Board of Directors 2007**



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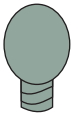


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# HOW TO USE THIS WORKBOOK

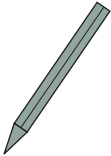
By completing the steps in this workbook, you will learn what it means to be a decision maker or advisor for an organization. You will know what is important to you when joining a Board of Directors or Committee.

## This book will help you:



### **THINK**

What kind of Board of Directors or Committee you want to join



### **PLAN**

How to get information that helps you make a decision



### **DO**

Decide if the Board or Committee is right for you

# WHAT IS A BOARD OF DIRECTORS?

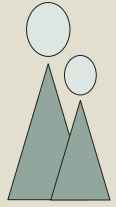
A Board of Directors is a group of people who make decisions about what an organization does and how it is managed. Board members write policies that are rules and regulations to guide the organization.

Members are selected to represent different groups from the community.

## **The Board decides:**

1. Who runs the organization
2. How the organization will operate
3. How much money will be spent
4. What the organization does for the community
5. Who is selected to be on the Board

# WHO LEADS THE ORGANIZATION?



A Board is led by officers. They have required jobs that help the Board run smoothly and carry out its mission. All Boards must have at least two officers. Each officer has responsibilities.

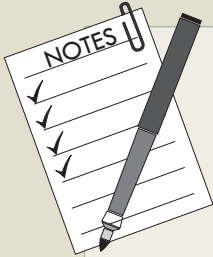


**THE PRESIDENT** leads the Board and its activities. He/she runs the Board in a business-like manner and follows all laws. The President leads the meetings and chairs the Board's Executive Committee.



**THE VICE PRESIDENT** is the backup for the Board President. The Vice President is often assigned additional duties such as chairing special committees. He/she leads the meeting when the president is not there.

# WHO LEADS THE ORGANIZATION?



**THE SECRETARY** makes sure Board business is documented with minutes of meetings and all important decisions. He/she ensures records of the Board are up to date.



**THE TREASURER** makes sure financial records are complete. He/she provides timely reports to the Board and ensures an audit [official review] of the organization's finances is done.

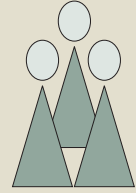


## WHAT IS AN EXECUTIVE DIRECTOR?

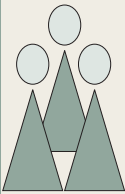
The Board hires an Executive Director to run the organization. The Executive Director carries out the Board policies so the organization meets its goals.

The Executive Director hires employees to do the work.

# WHAT IS A COMMITTEE?



**A COMMITTEE** is a group directed by the Board to carry out work and projects then report back to the Board.



**THE EXECUTIVE COMMITTEE** carries out the Board's responsibilities and makes decisions when the full Board cannot meet. Board officers are members of the Executive Committee.



**A STANDING COMMITTEE** is an ongoing group that meets regularly. Standing Committees include Executive, Finance, and Nominating.



**AN AD HOC COMMITTEE** is a group asked by the Board to work on a project or gather information for a limited time.



# WHAT IS A MEMBER'S JOB?

Members are responsible for making sure the organization follows the law and its budget. Members must be informed about community needs and the organization's services.



## MEMBER RESPONSIBILITIES

- Prepare for meetings and complete assignments
- Understand and follow the bylaws  
[rules that explain how a board runs]
- Stay informed about important issues that affect the organization
- Keep important information confidential  
[discussed only with members at meetings, never with anyone outside the meeting]
- Give opinions on issues
- Work as a team member
- Understand and practice meeting rules

## WHAT ARE ACCOMMODATIONS?

Accommodations are different ways to make places and meetings accessible so members can be comfortable and be included in important activities.



**ASSISTIVE TECHNOLOGY** are devices [tools] that allow a member to participate fully in meetings. Examples include a computer, tape recorder, hearing device.

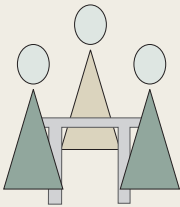


**ROOMS AND BUILDINGS** are easy to get around so members can choose where to sit and use the restrooms comfortably.

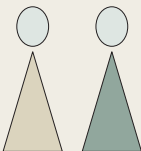
# WHAT ARE ACCOMMODATIONS?



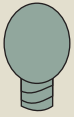
**ADAPTED MATERIALS** make information easily understood by all members. Adaptations can include using plain language, colors, large print, fewer words per page, pictures and summaries of important action and information.



**A FACILITATOR** is a person who helps a member with Board or Committee responsibilities. Duties can include: adapting meeting materials, following the meeting agenda, preparing before meetings, and arranging transportation.



**A MEETING MENTOR** is a member of the Board or Committee who gives support to another member before and during the meeting.



# THINK

11

## WHAT IS IMPORTANT TO ME?

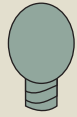
Volunteer Board and Committee members share their abilities and experiences to help make the organization the best it can be. It is important to know why you want to be on a Board or Committee before applying.

### WHAT IS MY MISSION ?



**(Check what is true for you)**

- Be a decision maker [advocate for change]
- Share my thoughts, ideas, and feelings
- Help improve the organization
- Teach other self-advocates about leadership
- Make a difference



## WHAT IS IMPORTANT TO ME?

Using the points you checked on page 11, write what YOU want to accomplish as a Board or Committee member. This is called a **Mission Statement**.

### Example of a Mission Statement:

**“I want to make a difference by sharing my ideas and feelings about improving the organization.”**

**My mission statement for volunteering as a Board or Committee member is:**



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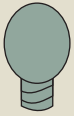
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### WHAT ORGANIZATION IS FOR ME?

- Community Service  
(Agencies that provide services and programs)
- Regional Center  
(Case management and coordination)
- Advocacy Group  
(Area Board, Protection & Advocacy, State Council)
- People First
- Community and Civic Organization  
(Red Cross, housing/shelters, recreation, local groups)
- Environmental and Animal Protection Service  
(Recycling, community service, zoo, animal shelters)
- Other \_\_\_\_\_



## WHAT WILL HELP ME BE EFFECTIVE?

Good boardsmanship means being prepared. Some members may want assistance with meetings and support with assignments. It is important to know what help you may need to complete your responsibilities.

### BEFORE THE MEETING

- Review and understand meeting materials
- Plan transportation
- Organize materials
- Other \_\_\_\_\_

### DURING THE MEETING

- Adapted materials
- Assistive technology, sign language interpreter
- Facilitator
- Other \_\_\_\_\_

### AFTER THE MEETING

- Review important information and things to do
- Organize paperwork
- Follow up with assignments
- Other \_\_\_\_\_



# PLAN

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## WHAT DO I NEED TO KNOW?

Name of Organization: \_\_\_\_\_

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

Phone \_\_\_\_\_

**I will talk to:**

**NAME**

**PHONE**

Executive Director _____	_____
President/Chair _____	_____
Board Member _____	_____

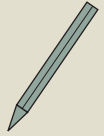
**DATE**

**TIME**

Appointment _____	_____
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# PLAN



## WHAT QUESTIONS WILL I ASK?

What kind of organization is this

- Service Provider
- Regional Center
- Advocacy
- Community Service
- Environmental
- Animals
- Other \_\_\_\_\_

Who benefits from your service

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Is there an opening on the Board of Directors or a Committee

**YES**      **NO**

How long is a member's term

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How often does the Board or Committee meet

Day \_\_\_\_\_

Time \_\_\_\_\_



# PLAN

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## WHAT QUESTIONS WILL I ASK?

As a member, are there extra duties I would have to do

- Help at events
- Special meetings
- Assignments
- Public speaking
- Advocacy
- Other

What support can the organization provide

- Transportation
- Adapted material
- Facilitation
- Meeting mentor
- Other

Are supports paid by the organization

**YES**      **NO**

Are there membership fees

**YES**      **NO**

Are you near public transportation

**YES**      **NO**

Are you located in a safe place for night meetings

**YES**      **NO**



# PLAN

## 18 WHAT QUALIFIES ME TO BE A MEMBER?

My experience with this kind of organization.

My experience on Boards and Committees.

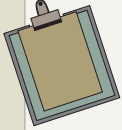
Why joining this organization is important to me.

My mission statement



## OUR AGREEMENT

I agree to:



- Fulfill member responsibilities
- Share my opinions and ideas at meetings
- Complete the assignments
- Other \_\_\_\_\_

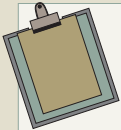
Signature \_\_\_\_\_

Date \_\_\_\_\_



CUT ALONG THIS LINE

The organization agrees:



Provide:

- Meeting Mentor
- Facilitator
- Adapted materials
- Transportation
- Other \_\_\_\_\_

Signature \_\_\_\_\_

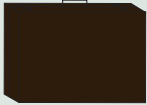
Date \_\_\_\_\_

# GOOD IDEAS



## **Be a professional**

Present yourself as neat, clean, and well groomed.



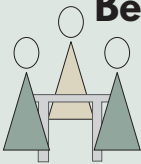
## **Be prepared**

Meet with your facilitator to review for the meeting.



## **Be organized**

Arrange transportation so you are on time.



## **Be an active participant**

Share your thoughts and make informed decisions.



## **Be responsible**

Follow up with homework after the meeting.

# THINK AS A LEADER

# BOARDSMANSHIP RESOURCES

**Boards For All** (2005). Board Resource Center. Post Office Box 60-1477 Sacramento, CA 95860. (866) 757-2457 [www.brcenter.org](http://www.brcenter.org).

**Empowering People To Be On Boards; Information About Being a Member of a Board or Advisory Committee** (1995). B. Benson, et al. Developmental Disabilities Board Area 3. (916) 324-7426

**Facilitation Guide** (2004). The Board Resource Center. Post Office Box 60-1477 Sacramento, CA 95860. (866) 757-2457 [www.brcenter.org](http://www.brcenter.org).

**Fa-cil-i-tate: To Make Easier, Assisting People With Disabilities Who Are Members of Boards or Advisory Committees** (1995). B. Benson et al. Developmental Disabilities Board Area III. (916) 324-7426.

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

**Get on Board and Make a Difference, Effective Practices for Including People with Developmental Disabilities and New Members on Boards and Committees.** Green Mountain Self-Advocates. [www.state.vt.us/dmh/docs/ds/pubs-dev.html](http://www.state.vt.us/dmh/docs/ds/pubs-dev.html)

**Not Another Board Meeting, Guide to Building Inclusive Decision-Making Groups** (1995). Oregon Developmental Disabilities Council. (503) 945-9941.

## ACKNOWLEDGMENTS

Thank you to those who gave time and expertise to develop this tool. It will open doors for self-advocates to become active members of Boards and Committees.



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### Concept and Development

Board Resource Center ([www.brcenter.org](http://www.brcenter.org))

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