

## Tab F – Tips for Effective Team Work

One of the benefits of working in any team is the experience and perspective of different members. Individuals who come from different backgrounds and points of view will create a team that, when working well, responds to challenges with different ideas and solutions.

A team that is diverse in the experience and perspectives of its members will bring more ideas to discussions and thus solve problems more strategically.

Even individuals who have similar experience often have different perspectives on what the problem is, and thus may have different solutions. More collective knowledge and varied perspectives enable a group to identify more criteria than an individual working on the same problems. It is with that in mind that the MTARS team was developed.

There are many types of teams. Some teams function together over a long period of time, working for a long-term goal. Other teams are brought together to address a single issue or event. The latter is the case with the MTARS. Because individuals on the MTARS team may not know one another the review starts off with a team meeting. The first team meeting is important in that it allows the team members to meet one another, share their backgrounds, and ‘get on the same page.’ Individual team members have different responsibilities during the review. These responsibilities are assigned at the first team meeting. Knowing what is expected of them helps team members feel more comfortable.

### Effective Teams

**Know your responsibilities:** Learn these by attending the team meeting, even if you have done a review before.

**Be clear on expectations and timelines:** The success of the entire team rests on the ability of each team member to do their job when it is necessary.

**Ask questions and share information:** Information that is shared benefits the team decision-making process. In other words, communicate!

**Support one another:** If another team member is struggling or not participating in the discussion, make room for their point of view. Ask questions! Everyone’s ideas are important to the problem-solving process.

**Ask for help:** Voicing your needs may put an issue on the table that others are struggling with.

# Tab G – Sample Conference Call Agenda

## CONFERENCE CALL AGENDA

### Arizona MTARS

December 18 from 1:00 – 2:00 p.m. EST

#### AGENDA

1. **Brief overview on the purpose of MTARS**
2. **Review of team structure and team members**
3. **Hotel arrangements & logistics**
4. **Self-assessments**
  - a. What is the purpose of the self-assessments?
  - b. What is the responsibility of the programs?
  - c. What is the responsibility of the team members?
  - d. Identifying need for technical assistance
  - e. Documentation
  - f. Interviews
  - g. Timelines
  - h. Sending out checklists
5. **Overview of the MTARS**

#### *Entrance meeting videoconference*

- a. Logistics for the videoconference
- b. Presentation on the State of the State
  - i. Overview of the State
  - ii. Demographics (unserved/underserved, cultural, geographic – related to service system)
  - iii. Service system structure – please provide a highlight summary of issues/challenges
  - iv. IDEA
  - v. Adult services
  - vi. Medicaid/waiver
  - vii. Vocational ed
  - viii. Institutional services
  - ix. Governor’s plan for services
  - x. Olmstead
  - xi. Legislative factors
  - xii. Economic factors (funding issues)
  - xiii. Brief overview of each program and how it works in the state
- c. Presentation on DD Network Collaboration Meeting
  - i. How have the programs fused their respective roles in collaborative efforts?
  - ii. How do you make collaboration work in your State? For example, how do you collaborate with other entities? How do you develop/implement the State plan?

- iii. In what ways does the DD Network strategically plan for collaboration?
- iv. What are specific examples of collaboration within the collaboration index?
- v. What is your impact as a Network? For example, what has changed for individuals with developmental disabilities in your state as a result of your collaboration?
- vi. What are your strengths as a Network?

*Public Forum:*

- a. Logistics for the public forum
- b. The MTARS team wants to hear from people how the programs have changed their lives.
- c. The Team Coordinator leads the public forum.
- d. Remote hook-ups in outside areas are encouraged.
- e. Schedule on first day of review

*Site Visit:*

- a. Program Teams visit individual programs and conduct interviews and document reviews
- b. Interview questions are generated from programs' completion of self-assessment as well as from standard interview questions provided to team members.
- c. Examples of people who are interviewed:
  - i. Council team interviews:
    - 1. Council Chair
    - 2. Executive Director
    - 3. Council members
    - 4. Key Council staff including fiscal staff
    - 5. DSA representative
    - 6. Sub-grantees
    - 7. Individuals and families benefiting from program activities
  - ii. P&A team interviews:
    - 1. Board/Advisory Council President and members
    - 2. Executive Director
    - 3. Accountant/bookkeeper and other key staff
    - 4. Clients
    - 5. Governor liaison
  - iii. UCEDD team interviews:
    - 1. Director
    - 2. Faculty/staff
    - 3. Dean and/or Provost/University President
    - 4. Current and Former Trainees
    - 5. Community Collaborators
    - 6. Consumer Advisory Committee
    - 7. Individuals with DD/Family members
- d. Teams may conduct additional interviews or provide technical assistance
- e. Exit interview conducted on the last day of the site visit
  - i. May last up to two hours
  - ii. MTARS team meets to develop format for exit interview and prepare collaboration information
  - iii. Program teams develop key points for exit interview
  - iv. All MTARS team members and grantees are present
  - v. Grantees determine the location of the exit meeting

**6. Questions**

## Tab H – Hotel Amenities Checklist

### HOTEL AMENITIES

<i>Hotel Features</i>	
	Close to grantee
	Accessible rooms available
	Non-smoking rooms available
	Toll-free phone service
	Restaurant(s) on-site or within walking/driving distance
	Near public transit, if available
	Hotel parking if teams have vehicles
	Low noise – not on street level in busy, congested area

<i>Business Services</i>	
	Full-service business center or Copy and Fax Service
	Free Wi-Fi and/or cable connectivity for computer access (check to see that it is in both group meeting space as well as in individual rooms)
	Meeting space available to accommodate MTARS team discussions
	Water/Refreshments for meetings held in hotel
	Conference call capability
	Overnight delivery/pickup

<i>Accessibility Needs</i>	
	Service animals allowed for persons with disabilities
	Roll-in showers for those with wheelchair/mobility needs
	ADA compliant doorways
	Elevator access to rooms

*Note: Please visit the Access Board website for resources on accessibility:*  
<http://www.access-board.gov/adaag/checklist/a16.html>

## Tab I – MTARS TEAM COORDINATOR CHECKLIST

<b>State:</b>
<b>Dates:</b>

<b>SITE VISIT PREPARATION</b>	Timeline	Council	P&A	UCEDD
<b>MTARS announcement</b> Confirm MTARS announcement letter, checklists, and MTARS manual was received from the Commissioner was received by grantees				
<b>Recruiting review team members</b> <ul style="list-style-type: none"> <li>• Remind Team Leads to ask grantees for any particular needs or issues for which they want assistance and select appropriate team members</li> <li>• Keep in mind location, geographic size and allotment of state, etc.</li> <li>• Get approval from ADD Administration for proposed MTARS team members</li> <li>• Work with ADD Administration to identify and confirm the fiscal reviewer</li> </ul>				
<b>Invitation to team members</b> <ul style="list-style-type: none"> <li>• Confirm Program Team Leads have contacted team members to request participation in MTARS.</li> <li>• Confirm that Team Leads asked members for information on accommodations and have explained the time requirement for meetings, including entrance meeting, as well as estimated time commitment for training, checklist review, and onsite monitoring</li> <li>• Ensure that Program Team Leads provide contact information for Program Team members</li> </ul>				
<b>Team member and grantee contact sheet</b> <ul style="list-style-type: none"> <li>• Develop sheet of team member and grantee contact information (see Tab M in MTARS notebook for contact sheet format). Include: Central Office staff, peers, consumers, fiscal reviewer from regional office</li> <li>• Send to grantees and all team members</li> <li>• Send to logistics contractor via ADD Project Officer</li> <li>• Send to ADD Administration</li> </ul>				
<b>Travel for non-federal members</b> Communicate through ADD Project Officer with logistics contractor to ensure that travel arrangements for non-federal team members are made for the Entrance Meeting and site visit: <ul style="list-style-type: none"> <li>• communicate individual needs (e.g., need for accessible room, transportation, etc.)</li> <li>• communicate travel and hotel reservations for entrance meeting, training and onsite review</li> <li>• set deadline for making travel reservations</li> </ul>				
<b>Initial conference call</b>				

<p>Schedule and conduct conference call with grantees and Team Leads</p> <ul style="list-style-type: none"> <li>• Purpose: to review MTARS process; announce team members; discuss logistics; get hotel recommendations; give date for return of checklists; determine date of entrance meeting one month before onsite MTARS review; public forum; etc.</li> <li>• select date and time for initial conference call</li> <li>• make call arrangements (conference call or webinar setup)</li> <li>• facilitate call (see Tab G in MTARS notebook for sample agenda for the call) <ul style="list-style-type: none"> <li>○ Remind grantees to keep in mind the reader, err on the side of simplicity and accessibility</li> <li>○ Give examples of materials needed</li> <li>○ use to call to reinforce the need for accessible space during all aspects of the review, including the public forum</li> </ul> </li> <li>• take notes and provide follow-up summary of call to team members and grantees</li> </ul>		
<p><b>Follow-up email to grantees</b></p> <p>Following initial conference call, electronically provide information about the call, including the entrance meeting/public forum to grantees including:</p> <ul style="list-style-type: none"> <li>• Deadline for submitting checklists- <i>encourage use of materials provided by electronic means</i></li> <li>• Regarding the entrance meeting: <ul style="list-style-type: none"> <li>○ Date for the entrance meeting</li> <li>○ Sample schedule for entrance meeting (see Tab L of the MTARS notebook)</li> <li>○ Purpose</li> <li>○ Lead coordinator for the grantees for Video/audio/webinar who will check on capability and serve as contact for logistics</li> <li>○ Deadline for submitting presentation materials to ADD and team members (minimum one week ahead of entrance meeting) - <i>encourage use of materials provided by electronic means</i></li> </ul> </li> <li>• Regarding the public forum <ul style="list-style-type: none"> <li>○ Format for the public forum (i.e., no presentations by review team; three minutes per speaker; note taker and timer at each site) (see Tab K of the MTARS notebook)</li> <li>○ Note taker guidelines (see Tab K of the MTARS notebook)</li> <li>○ Room setup, including accessibility of site (see Tab K of the MTARS notebook)</li> <li>○ Sample public forum notice (see Tab O of the MTARS notebook) (Recommend the notice be done in English and Spanish)</li> <li>○ Accommodations are provided (e.g., accessible site, sign language interpreters present)</li> <li>○ Research the availability of videoconferencing technology to set up various sites across the State.</li> </ul> </li> </ul>		

<ul style="list-style-type: none"> <li>• Regarding the site visit: <ul style="list-style-type: none"> <li>○ Hotel amenities checklist (see Tab H of the MTARS notebook)</li> </ul> </li> </ul>			
<p><b>Research hotel accommodations for the site visit</b></p> <ul style="list-style-type: none"> <li>• Determine where Program Teams will be staying. For Program Teams staying in a different location, ensure the Lead is researching hotel accommodations.</li> <li>• For the Program Teams staying in the same location as the MTARS Team Coordinator, utilize the hotel amenities checklist to research hotels and determine if they meet ADD specifications and team needs: <ul style="list-style-type: none"> <li>○ consider whether meeting space is needed</li> <li>○ ensure that accessible rooms are available and provide appropriate accommodations based on person's needs</li> <li>○ Ensure that the hotel is able to offer the federal rate. <i>Note:</i> find out the federal rate for the area traveling to by going to <a href="http://www.gsa.gov/Portal/gsa/ep/home.do?tabId=0">http://www.gsa.gov/Portal/gsa/ep/home.do?tabId=0</a></li> <li>○ If federal rate cannot be secured, work with director to seek approval of using hotel at the non-federal rate</li> </ul> </li> <li>• Review all possibilities with the Program Team Leads and ADD's Logistical Contractor to reach a final decision.</li> </ul>			
<p><b>Checklist and documentation receipt</b></p> <p>Confirm due date is met for grantees to send completed checklists and documentation to the Program Team Leads and team members (Team Leads provide grantees with mailing addresses for team members)</p>			
<p><b>Entrance meeting confirmation</b></p> <ul style="list-style-type: none"> <li>• Contact ACF to get information about setting up videoconference and/or Webinar capability</li> <li>• Confirm date, schedule and logistics for entrance meeting with grantees, ADD staff, and team members</li> <li>• Review entrance meeting format with grantees</li> <li>• Ensure that presentation materials (power points and electronic materials) are received by ADD staff and MTARS team members minimum one week ahead of entrance meeting</li> <li>• Confirm audio/video linkup with the grantee lead coordinator and ACF</li> <li>• Confirm with program team lead who will be in attendance or participating remotely</li> <li>• Make sure that program Team Leads have confirmed that team members participating remotely have the appropriate electronic hook-ups</li> </ul>			

<p><b>Public forum confirmation</b></p> <ul style="list-style-type: none"> <li>• Confirm date and location of public forum (with entrance meeting or first day of onsite review)</li> <li>• Review and approve announcement of public forum sent out (provide sample announcement – see Tab O of the MTARS notebook)</li> <li>• Confirm format with grantees (i.e., no presentations by review team; three minutes per speaker; note taker and timer at each site)</li> <li>• Confirm name of notetaker and timekeeper(s)</li> <li>• Confirm that space is accessible</li> <li>• Coordinate with Z-Tech staff to secure ADD fact sheets, program brochures, etc. in advance of the visit to distribute at the Public Forum. Send to grantees for distribution.</li> <li>• Provide on-site coordinator with information about the public forum (e.g., time, location, notetaker, timekeeper, etc)</li> </ul>			
<p><b>MTARS Team Meeting logistics</b></p> <ul style="list-style-type: none"> <li>• Working through the ADD Project Officer with the logistics contractor, determine where the MTARS team meeting will be held</li> <li>• Ensure that hotel space is secured, as needed</li> <li>• Ensure that travel arrangements are made for team members that will be on site for the meeting</li> <li>• Ensure that team members participating remotely have all the logistical information (for the training, entrance meeting, and team meeting)</li> <li>• Provide on-site coordinator with information about the MTARS team meeting logistics</li> </ul>			
<p><b>Confirm onsite interview locations with Program Team Leads</b></p> <ul style="list-style-type: none"> <li>• Determine if hotel meeting space is necessary for interviews/team discussions</li> </ul>			
<p><b>Confirm checklist correspondence with grantees</b></p> <ul style="list-style-type: none"> <li>• After checklist reviews confirm that Program Team Leads correspond with grantees regarding questions and further information requested by review teams.</li> <li>• Ensure that Program Team leads <ul style="list-style-type: none"> <li>○ Identify and discuss potential compliance issues</li> <li>○ Discussed other issues/concerns are</li> <li>○ Recognize best practices</li> <li>○ Discuss specific interviews and site visit schedule</li> </ul> </li> </ul>			
<p><b>Confirm grantee response</b> Confirm grantees reply to questions and subsequent info is sent to/discussed with team members</p>			
<p><b>Confirm team leads are developing schedule for review week; track draft schedules and draw up Master Schedule when finalized</b></p>			
<p><b>Conduct teleconference with grantees to confirm final logistics</b></p>			



<ul style="list-style-type: none"> <li>• Finalize logistics</li> <li>• Finalize schedule</li> <li>• Answer lingering questions</li> <li>• Finalize transportation arrangements</li> <li>• Communicate this information to Team leads as necessary</li> </ul>				
<p><b>Confirm travel plans for non-federal team members</b></p>				
<p><b>Remind federal Team Members to schedule travel prior to MTARS onsite review</b></p>				
<p><b>Distribute Master Schedule to grantees and team members. Include team members travel information with Master schedule:</b></p> <ul style="list-style-type: none"> <li>• Team members flight arrangements</li> <li>• Team members cell phone numbers</li> <li>• Hotels for teams</li> <li>• Logistics Contract contact numbers</li> </ul>				
<p><b>Reserve conference call line for on-site MTARS team meeting</b></p> <ul style="list-style-type: none"> <li>• The MTARS team will meet the day before the Exit Meeting to discuss feedback on network collaboration</li> <li>• Schedule a conference call line for the full team meeting</li> <li>• Share the conference call number with on-site coordinator</li> </ul>				

<b>REPORT WRITING</b>				
As much as possible, draft State-of-the State and collaboration reports ahead of onsite review (see Tab R of the MTARS notebook for guidelines for the report format)				
Develop time line for report and track report status (see Section 7 of the MTARS notebook for a timeline)				
Confirm individual draft program reports are circulated to grantees and to team members for review				
Confirm draft state-of-the-state and collaboration reports are circulated to team members for review				
Confirm comments on draft report received from team members and grantees and incorporated into report if appropriate				
Schedule one-hour meeting with Commissioner to review and approve the report				
Send draft report to editor for formatting				
Send draft report to program leads for final editing				
Confirm cover letter is drafted and final report with corrective action plan letter to grantees (see Tab S of the MTARS notebook for sample) <ul style="list-style-type: none"> <li>If a report is held up for AG review discuss release of other program reports so that they are not held up</li> </ul>				
Copy of final report and cover letter sent to Team Leads and saved on F drive at <a href="F:\MTARS\2008">F:\MTARS\2008</a>				

## Tab J – ON-SITE COORDINATOR CHECKLIST

<b>State:</b>
<b>Dates:</b>

<b>SITE VISIT PREPARATION</b>	<b>Timeline</b>
<b>Ensure that the Team Coordinator provides logistical information</b>	

<b>SITE VISIT</b>	<b>Timeline</b>
<b>MTARS team meeting</b> <ul style="list-style-type: none"> <li>• Ensure everyone knows what room they are meeting in</li> <li>• Start and end the meeting on time</li> <li>• Ensure the conference call and phone is working before the meeting is scheduled to start</li> </ul>	
<b>MTARS team meeting to prepare for Exit Meeting</b> <ul style="list-style-type: none"> <li>• Ensure the conference call and phone is working before the meeting is scheduled to start</li> <li>• On the call, ask that team members share their prepared notes on network collaboration</li> <li>• Identify summary points regarding network collaboration</li> <li>• Determine the format for the Exit Meeting (e.g., which team will go first, second, third, etc.)</li> </ul>	
<b>Exit Meeting</b> <ul style="list-style-type: none"> <li>• Prepare notes that summarize the team's findings with regard to network collaboration</li> <li>• Facilitate the Exit Meeting</li> </ul>	
<b>Addresses</b>	

<ul style="list-style-type: none"><li>• Using the contact sheet prepared by the MTARS coordinator, confirm addresses for mailing the final report</li><li>• Get addresses for:<ul style="list-style-type: none"><li>○ DD Council Chair</li><li>○ P&amp;A Board</li><li>○ University administrator</li></ul></li></ul>		
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## TAB K - PROGRAM TEAM LEAD CHECKLIST

<b>State:</b>
<b>Dates:</b>

SITE VISIT PREPARATION	TIMELINE
<p><b>Recruiting MTARS Program Team members</b></p> <ul style="list-style-type: none"> <li>• Ask grantee for any particular needs or issues for which they want technical assistance and select appropriate team members</li> <li>• Keep in mind location, geographic size and allotment of state, etc.</li> <li>• Provide list of proposed Program Team members to Team Coordinator. Include name, role of member (e.g., peer, consumer) and accommodations needed</li> <li>• Once proposed Program Team members are approved, contact potential Program Team members to recruit them for the MTARS. In doing so, ensure availability, explain commitment necessary of team members, and get information on accommodations</li> <li>• Once confirmed send MTARS team coordinator list of team members. Include contact information and role of reviewer.</li> </ul>	
<p><b>Participate in initial conference call with grantees facilitated by the MTARS team coordinator</b></p> <ul style="list-style-type: none"> <li>• Answer any questions grantee may have about the checklists and documents required</li> <li>• Follow-up as needed with grantee to further discuss MTARS logistics and/or checklists</li> </ul>	
<p><b>Research and confirm accommodations for the site visit</b></p> <p>For MTARS where Program Teams stay in different locations, research hotel accommodations for your team</p> <ul style="list-style-type: none"> <li>• Contact grantee for hotel recommendations. Use the hotel amenities checklist (see Tab H of the MTARS notebook)</li> <li>• After receiving recommendations from the grantees, utilize the hotel amenities checklist to research hotels and determine if they meet ADD specifications and team needs:             <ul style="list-style-type: none"> <li>○ consider whether meeting space is needed</li> <li>○ ensure that accessible rooms are available and provide appropriate accommodations based on person's needs</li> <li>○ Ensure that the hotel is able to offer the federal rate. <i>Note:</i> find out the federal rate for the area traveling to by going to <a href="http://www.gsa.gov/Portal/gsa/ep/home.do?tabId=0">http://www.gsa.gov/Portal/gsa/ep/home.do?tabId=0</a></li> <li>○ If federal rate cannot be secured, work with director to seek approval of using hotel at the non-federal rate</li> </ul> </li> </ul>	

<p><b>Prepare for On-site Meeting Logistics</b></p> <ul style="list-style-type: none"> <li>• Determine site for interviews (hotel or grantee office)</li> <li>• coordinate with Team Coordinator or ADD Project Officer for the logistics contract if meetings will be held in hotel to ensure that expense is within MTARS budget</li> </ul>	
<p><b>MTARS Team Meeting logistics</b></p> <p>Check with Team Coordinator to determine</p> <ul style="list-style-type: none"> <li>• where the MTARS team meeting, public forum, and Exit Interview will be held</li> <li>• travel arrangements for Program Team members who will be on site for the meeting</li> <li>• Conference call/webinar information for team members participating remotely</li> </ul>	
<p><b>Checklist and documentation receipt</b></p> <ul style="list-style-type: none"> <li>• After initial conference call with grantees, ensure grantees have mailing addresses for Program Team members to send checklists and documentation.</li> <li>• Contact Program Team members to ensure all have received checklists and documentation</li> </ul>	
<p><b>Checklist and documentation review</b></p> <ul style="list-style-type: none"> <li>• After receiving the checklists and documents, set aside at least three to five days to thoroughly read and review all materials.</li> <li>• Take notes on items that you want to hear more about (note – these may be positive accomplishments or areas of concern)</li> <li>• After checklist reviews, hold at least one meeting with Program Team members to discuss the review of the checklist. <i>Note:</i> this may be done after the entrance meeting videoconference</li> <li>• Hold additional calls, as necessary with Program Team to discuss the review of the materials</li> <li>• After discussion(s) with Program Team members, develop a document that summarizes the team’s findings. Include: <ul style="list-style-type: none"> <li>• Areas of strength/promising practices</li> <li>• Questions about issues that need to be further reviewed</li> <li>• Identify potential compliance issues</li> </ul> </li> <li>• Email program team members summary to ensure that all comments and questions have been captured</li> <li>• Make changes to summary as needed</li> <li>• Get available dates from Program Team members for conference call with grantee</li> </ul>	
<p><b>Conference call with grantee</b></p> <ul style="list-style-type: none"> <li>• Email final draft of summary of Program Team findings to the grantee. Include at least two possible dates for a conference call to discuss the summary.</li> <li>• Set up conference line for conference call once a date has been set</li> <li>• Use the conference call to discuss questions and get further information requested by review team.</li> </ul> <p>Ensure that:</p> <ul style="list-style-type: none"> <li>○ Promising practices are recognized</li> </ul>	

<ul style="list-style-type: none"> <li>○ Potential compliance issues are discussed</li> <li>○ Other issues/focus areas are discussed</li> <li>○ Specific interviews for the site visit are discussed</li> <li>○ The on-site schedule is discussed</li> <li>● Schedule follow-up conference calls with Program Team and/or Exec if necessary</li> </ul>	
<p><b>Confirm grantee response</b></p> <ul style="list-style-type: none"> <li>● Confirm grantees reply to questions and subsequent information is sent to/discussed with Program Team members, as needed</li> <li>● Hold additional conference calls with grantee and Program Team members as needed.</li> </ul>	
<p><b>Developing schedule for site visit</b></p> <p>Communicate with Executive Director to confirm the schedule site visit</p> <ul style="list-style-type: none"> <li>● Request that the Director develop a draft schedule. Refer to Tab N of the MTARS notebook for a sample schedule.</li> <li>● Ensure that the Director provides a copy of the draft schedule at least three weeks before the site visit. In reviewing the site visit schedule, ensure that the proposed agenda: <ul style="list-style-type: none"> <li>○ allows sufficient time for interviews</li> <li>○ allows for travel time and is accommodating to review team</li> <li>○ build s in meeting time for Program Team and for full MTARS team review of collaboration</li> <li>○ addresses all the areas the review team identified in the summary</li> </ul> </li> <li>● Ensure that the Director sends a final schedule at least two weeks before the site visit that includes the following: <ul style="list-style-type: none"> <li>○ Specific times and individuals to be interviewed</li> <li>○ Interview sites</li> </ul> </li> <li>● Email a copy of the final schedule to the MTARS team coordinator and to Program Team members</li> </ul>	
<p><b>Plan for the on-site travel logistics</b></p> <ul style="list-style-type: none"> <li>● Schedule personal travel, including rental car if needed, prior to MTARS onsite review and communicate it to MTARS team coordinator</li> <li>● Work with the grantee and Program Team members to determine logistics for on-site travel (e.g., traveling to interview locations)</li> <li>● Determine ground transportation from the airport to the hotel and get directions from the airport to the hotel and from the hotel to the interview sites, as needed</li> <li>● Keep current on travel regulations</li> </ul>	
<p><b>Prepare for on-site visit</b></p> <ul style="list-style-type: none"> <li>● Once the final schedule is received from the Director, have a conference call with Program Team members to discuss site visit schedule. On the call, <ul style="list-style-type: none"> <li>○ Review the site visit schedule</li> <li>○ Assign Program Team members responsibilities for leading interviews</li> </ul> </li> </ul>	

<ul style="list-style-type: none"> <li>○ Discuss suggested interview questions (refer to manual and develop specific questions for each site based on checklists and issue areas)</li> <li>○ Team meeting times</li> <li>○ Designated note takers (utilize lap top to take notes – Program Team lead generally is note taker)</li> <li>○ Reinforce the important role that team members play in conducting the review and writing the report</li> <li>○ Discuss travel logistics</li> <li>○ Decide whether team members will need to travel with their documents due to weight restrictions.</li> <li>○ Include Logistics contractor (Wanda) on calls with the team to review final logistics</li> <li>● After conference call, develop detailed schedule to include: <ul style="list-style-type: none"> <li>○ Specific times and individuals to be interviewed</li> <li>○ Interview sites</li> <li>○ Program Team member responsible for interview</li> <li>○ Designated note takers</li> </ul> </li> <li>● Disseminate detailed schedule to Program Team members and Team Coordinator</li> <li>● Ensure that a set of documents are on-site for reference.</li> </ul>	
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SITE VISIT	TIMELINE
<p><b>On-site Meeting Logistics</b></p> <ul style="list-style-type: none"> <li>● Meet with Program Team, as needed, the evening before the first day to review logistics</li> <li>● Determine how the Program Team will get to the site where interviews are taking place</li> <li>● Determine morning meeting times to ensure the team arrives on time</li> <li>● Get directions to the meeting locations, as needed</li> <li>● Determine if the Program Team will meet at night to discuss the site visit observations</li> </ul>	
<p><b>Exit Meeting</b></p> <ul style="list-style-type: none"> <li>● Meet with Program Team to discuss findings from the site visit and to discuss Exit Meeting logistics and the leads for presenting the findings. <i>Note:</i> ensure Program Team members each present part of the findings</li> <li>● Reinforce the important role that team members play in writing the report</li> </ul>	



<ul style="list-style-type: none"> <li>• Prepare notes that summarize the Program Team’s findings based on the topic areas of the checklist</li> <li>• Makes copies of the Exit Meeting notes for Program Team members</li> <li>• Schedule pre-Exit meeting interview with Executive Director and Chair (as appropriate) to discuss findings</li> <li>• Present findings at Exit Meeting</li> </ul>	
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<b>REPORT WRITING</b>	<b>TIMELINE</b>
As much as possible, draft any parts of the report ahead of time	
<p>Based on timeline provided by Team Coordinator:</p> <ul style="list-style-type: none"> <li>• Prepare draft report using own notes and notes from Program Team members</li> <li>• Send draft report to Program Team members for review</li> <li>• Edit draft report based on Program Team comments</li> <li>• Send draft report (with edits by Program Team Members) to Executive Director and Chair (in the case of the Council) for review</li> <li>• If necessary, discuss grantee comments with Program Team members</li> <li>• Edit draft report – include grantee comments if appropriate. <i>Note:</i> grantee comments should be used only if they are correcting data. Grantee comments should not be incorporated if they are changing the content or intent of the team’s report.</li> <li>• Send draft report to Team Coordinator</li> <li>• Work with the Team Coordinator to make any final edits to the report.</li> </ul>	

## Tab L – Format of the Contact Sheet for MTARS Team Members

STATE		
COUNCIL	P&A	UCEDD
<p><b>GRANTEE:</b>                      Developmental Disabilities Council                      Street Address                      City, ST ZIP</p> <p>Phone:                      FAX:                      E-Mail:                      Web Page:</p> <p>Executive Director:                      Email:</p> <p>Chair:                      E-Mail:</p>	<p><b>GRANTEE:</b>                      Protection and Advocacy                      Street Address                      City, ST ZIP                      Phone:                      FAX:                      Web Page:</p> <p>Executive Director:                      E-Mail:</p>	<p><b>GRANTEE:</b>                      UCEDD                      Street Address                      City, ST ZIP</p> <p>Phone:                      FAX:                      Web Page:</p> <p>Executive Director:                      E-Mail:</p>
<p><b>ADD:</b>                      ADD/ACF                      370 L'Enfant Promenade SW                      Mail Stop: HHH 405D                      Washington, DC 20447                      Phone: (202)                      Fax: (202) 205-8037                      E-mail:</p>	<p><b>ADD:</b>                      ADD/ACF                      370 L'Enfant Promenade SW                      Mail Stop: HHH 405D                      Washington, DC 20447                      Phone: (202)                      Fax: (202) 205-8037                      E-mail:</p>	<p><b>ADD:</b>                      ADD/ACF                      370 L'Enfant Promenade SW                      Mail Stop: HHH 405D                      Washington, DC 20447                      Phone: (202)                      Fax: (202) 205-8037                      E-mail:</p>
<p><b>PEER</b>                      Name                      Street Address                      City, ST ZIP                      Phone:                      Fax:                      E-mail:</p>	<p><b>PEER:</b>                      Name                      Street Address                      City, ST ZIP                      Phone:                      Fax:                      E-mail:</p>	<p><b>PEER:</b>                      Name                      Street Address                      City, ST ZIP                      Phone:                      Fax:                      E-mail:</p>

<b>PEER:</b> Name Street Address City, ST ZIP Phone: Fax: E-mail:	<b>PEER:</b> Name Street Address City, ST ZIP Phone: Fax: E-mail:	<b>PEER:</b> Name Street Address City, ST ZIP Phone: Fax: E-mail:
<b>OTHER MTARS TEAM MEMBERS</b>		
<b>FISCAL REVIEWER:</b> Name Street Address City, ST ZIP Phone: Fax: E-mail:		

## Tab M – Sample Joint Entrance Meeting Videoconference Agenda

8:30 a.m. – 9:00 a.m.	<b>Sign on to videoconference and check to make sure everyone is on-line</b>
9:00 a.m. – 9:30 a.m.	<b>Welcome and Opening Remarks</b> <i>MTARS Team Coordinator and DD Network Staff</i>
9:30 a.m. – 10:00 a.m.	<b>Introduction to the Network</b> <i>Director, UCEDD</i>  <i>Executive Director, P&amp;A</i>  <i>Executive Director, DD Council</i>
10:00 a.m. – 10:20 a.m.	<b>State of the State</b> <i>DD Network Staff</i>
10:20 a.m. – 10:35 a.m.	<b>BREAK</b>
10:35 p.m. – 11:15 p.m.	<b>State of the State cont.</b> <i>DD Network Staff</i>
11:15 a.m. – 11:30 a.m.	<b>Q &amp; A</b>
11:30 a.m. – 12:30 p.m.	<b>LUNCH</b>
12:30 p.m. – 1:15 p.m.	<b>Network Collaborations</b> <i>DD Network Staff</i>
1:15 p.m. – 1:30 p.m.	<b>BREAK</b>
1:30 p.m. – 2:15 p.m.	<b>Network Collaborations cont.</b> <i>DD Network Staff</i>
2:15 p.m. – 2:30 p.m.	<b>Q &amp; A</b>

## Tab N – Sample Notice of Public Forum

**Date and Time**  
**Building and Room Number**  
**Street, City, State**

**Representatives of the federal Administration on Developmental Disabilities will be visiting (insert State and date) to solicit comments from interested parties on:**

Your experiences with the work, program, and strategies employed by the following organizations in meeting the needs of individuals with developmental disabilities and their families in INSERT NAME of STATE.

- State Developmental Disabilities Council
- State Protection & Advocacy for Individuals with Developmental Disabilities
- State University Center for Excellence in Developmental Disabilities

**We encourage you to share your experiences in any way that you are comfortable:**

<b>IN PERSON</b>	If you plan on attending and wish to speak, we encourage you to contact the (entity) by c.o.b. (date) so that we may place you on the schedule and provide any needed accommodations. <b>Accommodations will be provided if requested prior to (date).</b>
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If you are unable to attend, you may submit your statement via the following methods, to arrive on or before, but no later than (date).

<b>MAIL</b>	(insert address)
<b>TELEPHONE</b>	Call (toll free number) (Voice/TDD) between (time), (date)
<b>FAX</b>	Forward your written comments to (phone number). Please note “public forum comments” on the subject line.
<b>E-MAIL</b>	Please e-mail your comments to (insert email address).
<b>WEBSITE</b>	A form for providing comments can be found on the following websites: http: