

Group Handbook & Tool Kit



Florida Self-Advocates Network'D / FL SAND

FLSAND.org

August 2018

Florida Self-Advocates Network'D (FL SAND) is sponsored by the United States Department of Health and Human Services, Administration on Intellectual and Developmental Disabilities and the Florida Developmental Disabilities Council, Inc.

About this Handbook & Tool Kit

The *Florida Self-Advocates Network'D Group Handbook & Tool Kit* has been developed to support the development and growth of the FL SAND network of local grassroots groups. This version of the handbook was developed by Organizational Management Solutions, Inc., FL SAND's training and technical assistance provider, under contract with the Florida Developmental Disabilities Council.

Acknowledgements

Content for the Handbook & Toolkit was compiled and adapted from the following sources.

- ❖ *Florida Grassroots Self-Advocacy Tool Kit* prepared by The Center on Human Policy at Syracuse University, 2007 (a previous edition of this handbook).
- ❖ *All About Groups*, a publication of the Self-Advocacy Association of New York State, Inc.
- ❖ *SABE Self-Advocacy Start-up Tool Kit*, a publication of Self-Advocates Becoming Empowered (SABE), 2000.
- ❖ *Officer Handbook*, People First of Washington.
- ❖ *Robert's Rules of Order*. Newly Revised in Brief, 2011.

Florida Self-Advocates Network'D

Mission Statement

Florida Self-Advocates Network'D (FL SAND) is a statewide association led by self-advocates who are united and active in speaking up for themselves, promoting rights, advocating for systems change, and creating community inclusion and awareness of its members.

Vision Statement

Florida Self-Advocates Network'D (FL SAND) will achieve freedom, independence, and equal rights with united voices and the power of sharing information. FL SAND will play an important leadership role in forming positive and healthy partnerships with businesses, organizations, and government, with the ultimate goal being inclusion for all.

Purpose Statement

The purpose of Florida Self-Advocates Network'D (FL SAND) is to support local grassroots advocacy organization, expand the Florida self-advocacy movement, provide a united voice for statewide issues and topics that are important to Florida self-advocates, create community awareness, and promote inclusion for all.

FL SAND is an independent 501(c)(3) organization comprised of 16 local grassroots groups, governed at the state level by a board of directors that includes representation from each grassroots group. More information about FL SAND and its local groups can be found at www.flsand.org. General information about self-advocacy and the self-advocacy movement in Florida can be found at FL SAND's news and information hub, Florida Self-Advocacy Central / www.FSACentral.org.



Table of Contents

Section 1: Introduction – Definitions of Self-Advocacy and the Purpose of a Self-Advocacy Group	4
Section 2: New Group Information	8
Joining FL SAND / Starting a FL SAND Group	8
Section 3: How Effective Groups Work	14
Group Roles: Leaders & Cheerleaders	14
Electing Officers	18
Group Meeting Basics	20
Managing Group Funds	24
Section 4: Group Activities and Projects	27
Self-Advocacy Activities & Projects	27
Education and Training	30
Giving Back: Community Service Projects	30
Fundraising	31
The Group that Plays Together Stays Together: Social Activities ..	33



Section 1: Introduction

Definitions of Self-Advocacy and the Purpose of a Self-Advocacy Group

What is self-advocacy? As a term, self-advocacy is generally defined *as speaking up when it comes to issues and decisions that are important in your life or to others with disabilities*. However, the term has become aligned with the self-advocacy group movement.

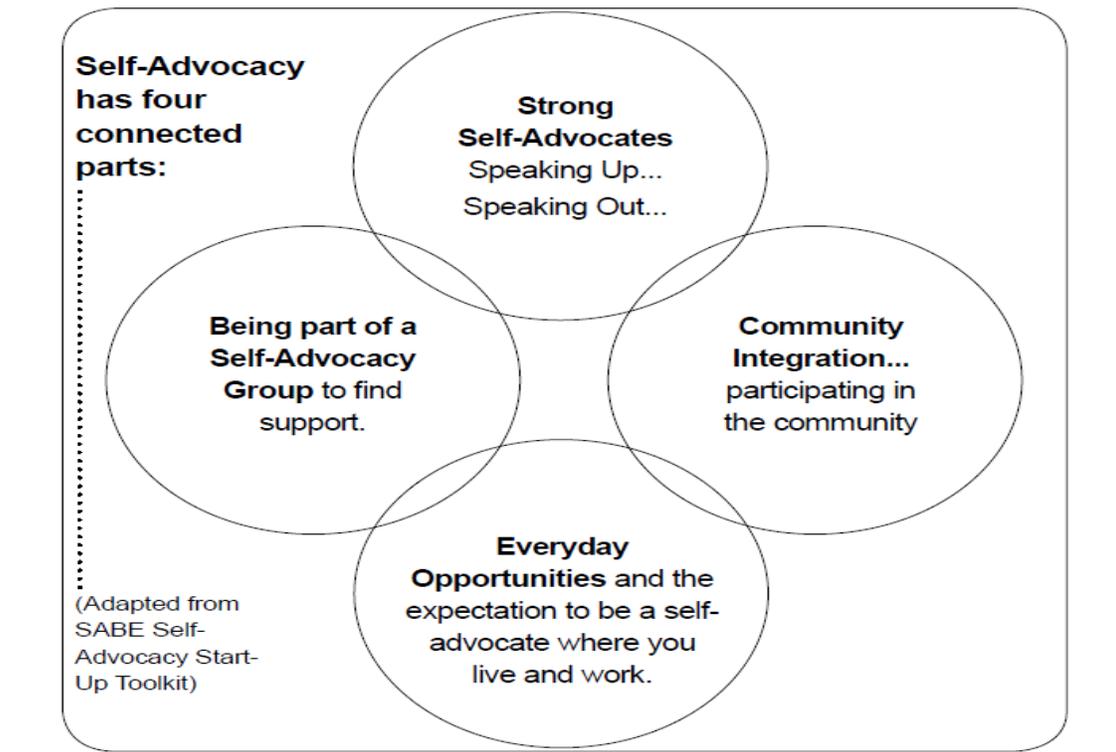
According to Self-Advocates Becoming Empowered (SABE), *“Self-advocacy is about independent groups of people with disabilities working together for justice*

by helping each other take charge of their lives and fight discrimination.

Self-advocacy groups provide a supportive environment where individuals can develop confidence and independence while working on issues that are important to them. It is important to help each other and always try to include and value the opinion of everyone in the group.

Encouraging people to make their own choices and keeping a positive attitude in group settings helps others to become empowered to be more independent. People also learn leadership skills and how to effectively communicate in self-advocacy groups. The activities of self-advocacy groups reflect the wishes and decisions of the group.

Self-advocacy groups also are a place where people come together to make changes in their communities and society. Groups can take individual problems to the policy-making and decision-making levels in their communities to solve common problems, like getting access to transportation.



Self-advocacy groups typically work on four types of activities



Advocacy & Education – Self-advocacy groups are a place to . . .

- ❖ Find out more about the rights and opportunities of people with disabilities
- ❖ Learn how voting and government work
- ❖ Learn about community resources
- ❖ Work for better services and programs
- ❖ Raise awareness in the community about disability issues
- ❖ Advocate for community living and inclusion
- ❖ Advocate for real jobs and fair wages
- ❖ Promote dignity and respect
- ❖ Overcome discrimination by educating the community
- ❖ Advocate for better laws
- ❖ Learn how to advocate for yourself and others
- ❖ Discover how to make changes in your home and workplace
- ❖ Develop and practice leadership and public speaking skills
- ❖ Hear about upcoming events like conferences and regional meetings

Service & Community Inclusion – groups offer self-advocates opportunities to . . .

- ❖ Serve on community boards, committees, and task forces
- ❖ Recruit allies in the community to serve as resources for the group (e.g. a local banker who can help the group with finances and fundraisers, a marketing professional who can help the group raise awareness about their projects, an attorney who can offer advice on accessibility issues, a local politician who can assist the group with access to community regulators or lawmakers, etc.)
- ❖ Give back to their communities through service projects such as mentoring school children, holding canned food drives, visiting nursing homes, etc.

Fundraising – groups can secure their future by . . .

- ❖ Asking members to pay dues
- ❖ Holding fundraisers like sales, car washes, dance-a-thons, walks, etc.

- ❖ Recruiting patrons – philanthropists and businesses in the community that will support the group with monetary and in-kind donations
- ❖ Turning in FL SAND quarterly reports on time

Social & Support – Self-advocacy groups are a place to . . .

- ❖ Meet together to make friends
- ❖ Receive support and learn from others who have similar life experiences
- ❖ Plan and hold picnics, parties, and recreation activities
- ❖ Have fun with friends after meetings
- ❖ Feel good about oneself and others

Section 2: New Group Information

Joining FL SAND

Groups can join the FL SAND network by application. Any self-advocacy group that organizes in Florida can request recognition from the FL SAND Board of Directors by completing the application process. An application for network membership is attached as Appendix I. FL SAND bylaws require that new groups meet the following criteria:

- ❖ Group is led by self-advocates
- ❖ Mission is similar to FL SAND's mission
- ❖ Self-advocate members elect their leaders – president, vice-president, etc.
- ❖ Self-advocate members choose their own advisor(s)
- ❖ Self-advocates develop their own agenda and activities
- ❖ Purpose of the group is self-advocacy activities
- ❖ If affiliated with an agency, remains independent of that agency and the way that agency functions
- ❖ Maintains membership records

Starting a FL SAND Self-Advocacy Group

Many FL SAND groups were started by self-advocates who lived in areas of the state that did not have a group. The FL SAND board and provider offer assistance to new groups wishing to join the network. The pre-application process involves taking the initial steps to form a group described here and ensuring the group conforms with the FL SAND bylaw requirements mentioned above.

It is important for members of the group to have control right from the beginning so that the group will be led and operated by self-advocates. Starting a group takes time. It takes time to make sure that everyone understands what is going on and is able to participate in starting the group.

Information and Guidelines for Starting a Self-Advocacy Group

General guidelines

1. There's strength in numbers. A self-advocate wishing to start a group should recruit 2-3 committed, core members to help plan and get the group off the ground. These members should understand the concepts of self-advocacy, self-determination, and what a self-advocacy group does and commit to attend meetings.
2. Groups must have an advisor who can commit to attend meetings and provide the level of technical assistance the group will need (See Appendix II: Role and Responsibilities of an Advisor). Advisors can be self-advocates.
3. Core team members should talk to local disability agency heads and community leaders. Tell them you're starting a group and ask for their support in advertising the group with their clients/consumers.
4. Find a regular meeting place and time that is accessible to people with disabilities in your community, such as . . .
 - a. At a disability agency such as the local Arc or Center for Independent Living. Potential members in your community are familiar with these locations and visit them on a regular basis.
 - b. At a local restaurant, church, or community building that is conveniently located (on bus routes, near disability agencies, etc.). If choosing a restaurant, pick a time that the restaurant is not normally busy. Finding a meeting place can be an advocacy and ally-building opportunity. Talk to a restaurant manager about using their meeting room and donating beverages for meetings; ask a church leader if their parishioners might also help provide transportation to meetings. Think of benefits your group can offer the organization providing the meeting space (E.g. advertising their support on social media; providing volunteers to their community events; or advertising their events, activities, or services to the group, etc.).
 - c. Choose a meeting time that is convenient for your core team and others most likely to come. Most groups meet in the evenings to

accommodate the schedules of self-advocates and advisors who work full time.

5. Advertise your first meeting: A variety of advertising tactics can be used to advertise meetings but group leaders should not feel like they have to “do it all” before the first meeting.
 - a. Fliers are helpful in announcing meetings. The “first meeting” flier should include advertising basics of who, what, when, and where. If you don’t have a group name – some groups wait to decide this at the first few meetings – the headline of the flier might read something like “New Group for Persons with Disabilities,” followed by a VERY brief description of what a self-advocacy group does.
 - b. Create a Facebook, Twitter, and/or Instagram page for your group. Post an announcement about the group’s formation and first meeting and ask your friends and followers – especially those who are part of the disability community -- to “share” the information across their social media accounts. An advisor, provider, and/or ally can help you set up a Facebook page and help you with basic social media skills.
 - c. An effective advertising strategy involves a broadcast and personal approach.
 - i. Broadcast strategies include: Asking agency managers and providers to distribute fliers to their clients. These agencies might include the Arc, Special Olympics, Easter Seals, Family Care Council, Centers for Independent Living, APD, Goodwill, etc. etc. Don’t forget disability services offices at local colleges in your area. Also ask the above supporters if they will send an email to their lists of consumers or clients with the details of the meeting.
 - ii. While broadcast techniques are a great way to make your community aware you are starting a group, a personal invitation is the most effective means of filling seats at your meetings. Each core team member should think of who he/she knows that might be interested in self-advocacy and invite

them personally and then call to remind them the week of the meeting.

- iii. Spend time at your first meeting brainstorming how you can advertise your meetings to potential self-advocates in your community.

Important Discussion Points & Decisions at the First Meetings

Don't attempt to address all these points at the very first meeting. Take your time. New groups may want to meet more frequently the first few months to make important decisions before settling into a regular schedule.

1. Explain the purpose of the group and make sure everyone understands the concepts of self-advocacy and self-determination.
2. Choose a name for your group.
3. Discuss a permanent meeting location and advisors if they have not been identified.
4. Decide how often the group will meet (most FL SAND groups meet monthly).
5. Keep notes/minutes until a secretary is elected.
6. Discuss and decide on rules and responsibilities that members should learn and understand. These may include election of officers, dues, voting, ways to treat one another, using an agenda, refreshments, managing group funds, etc. *Robert's Rules of Order* is a classic reference book for conducting group meetings that many groups choose to follow (Section 3: How Effective Groups Work includes detailed information on group roles and processes).
7. Decide where to open your group bank account and procedures and guidelines for spending group funds. Some banks will require a copy of your meeting minutes where the group voted to open an account and approved the officers who are authorized to sign checks.
8. Work on a group mission statement, goals, and a modest 6-month plan for projects and activities. Activities that may help you get started include

- a. Having members choose at least one personal goal that is in line with ideas about self-advocacy.
 - b. Developing group goals that members can work on together. Choose goals which are manageable for the group.
 - c. Discussing potential advocacy projects.
 - d. Discussing how to make connections with allies in the community. An ally is someone in your community who is not a member or formal advisor but can provide resources and assistance to the group (banker, attorney, public official, business owners, etc.).
 - 📄 Sample mission statement and goal-setting exercises are attached as Appendix III.
9. Decide if you want to write group bylaws and set a goal for when bylaws should be completed (3-6 months, etc.). If you completed most of the items in #s 6 and 8 above you have laid the groundwork for writing a set of bylaws. Bylaws are a set of governing rules that a group formally adopts and then abides by. Bylaws provide guidance for group processes and decision-making over time (especially in future years when leadership has changed) and keep groups accountable for operating consistently and with integrity. Bylaws can be amended at the group's discretion. (A copy of FL SAND's board of directors bylaws are attached as Appendix IV).
10. Invite the leaders of FL SAND groups close to your community to visit and talk about how their group works and to help mentor your leaders.

New Group Finances

FL SAND has some funds to assist new groups with start-up activities and will thereafter provide quarterly support to groups that submit reports on their activities. FL SAND groups must have a bank account in the name of the group before funds can be disbursed. Consult the FL SAND provider if you are unclear on the procedures for opening an account. OMS can also provide assistance with this process.

Shop around for a bank in your community that will waive fees for nonprofit community groups. Note: Unless your group has received 501(c)(3) status from

the Internal Revenue Service, you are not a tax exempt “Nonprofit Corporation;” but it is acceptable for you to refer to your group as being “nonprofit.” Banks will require your group to open a business account, which typically requires obtaining a Federal Employer ID number (FEIN) from the Internal Revenue Service and to register your group name as a fictitious name (“Doing Business As” or DBA) with the Secretary of State’s office. There is no fee for the FEIN but there are fees for the fictitious name registration. Most FL SAND groups have found banks who will waive the fictitious name registration if you explain the nature of your group. Obtaining an FEIN is an easy online process. OMS can provide assistance with obtaining your group’s FEIN. Some banks may also require you to provide minutes from a group meeting where the group officially approved opening a bank account and responsible parties.

You will need to ensure your group has a system of checks, balances, and guidelines for managing and spending your group funds. See the list of recommended checks and balances in Section 3, Managing Group Funds, and Section 4, Fundraising.

Section 3: How Effective Groups Work

Group Roles: Leaders & Cheerleaders

There's a place for everyone in a self-advocacy group. Every member has an important role. Groups need members who can lead meetings and manage funds and, just as importantly, members that are always available to lend a helping hand to coordinate events, pass out fliers, and help your group make a strong showing at advocacy events. One or two persons cannot do it all. They need support.

Qualities of Effective Leaders

Officers comprise the leadership team in your group. Under the leadership of the president, they work together to plan meeting schedules and agendas and make sure members know when and where meetings are held.

- ❖ Group officers must be good leaders. Effective leaders think about ways to make the groups they lead stronger. They ask for help, admit when they make mistakes, and find ways for all members to have jobs.
- ❖ Effective leaders give others the chance to lead. They mentor others in leadership skills and how to be officers so that other members can fill offices when they become open.
- ❖ Effective leaders encourage members to speak up and participate in the group.
- ❖ Effective leaders are responsible communicators and ambassadors for their group. They use technology to the best of their abilities and seek training in technology and communication skills. Effective leaders answer emails and phone calls in a timely manner.
- ❖ Effective leaders use simple language and help to make meetings accessible for all members.
- ❖ Effective leaders look for opportunities to learn more about leadership.

Elected Officer Job Descriptions

President

The president is the leader of the group, but this involves more than running meetings. He/She must be a good role model by attending meetings regularly and representing the group in the community. Above all, the president must encourage his/her members to be passionate about self-advocacy and contribute to the work of the group. If the president is unable to attend a meeting, he/she must notify the vice-president so he or she can run the meeting.

Before the Meeting: The president is responsible for calling the other officers to plan meetings.

During the course of the meeting, the president

- ❖ Runs the meeting, which involves calling the meeting to order.
- ❖ Asks the secretary to confirm who's at the meeting by taking roll or asking people to introduce themselves.
- ❖ Asks the secretary to read the minutes of the last meeting.
- ❖ Asks the treasurer to deliver the treasurer's report.
- ❖ Leads the group through the agenda.
- ❖ Calls for motions when appropriate.
- ❖ Politely, but directly, manages discussion so that some people don't talk too much and everyone gets to share their opinions.
- ❖ Adjourns the meeting (closes the meeting).

Vice-President

The vice-president should serve as a back-up to the president with the group and in the community. He/She should lead by example, attend meetings regularly, and help mentor group members hoping to be officers one day.

Before the Meeting: The vice-president attends officer meetings and helps plan the agenda.

During the course of the meeting, the vice-president

- ❖ Fills in for the president and runs meetings when the president is not able to attend.
- ❖ Helps the president during the meeting when needed or asked.

Secretary

The secretary keeps attendance records; takes notes at meetings, keeping a record of important decisions made (these notes are called “minutes”); and reminds members of meetings. He/She should be able to read and write and lead by example, attend meetings regularly, and help mentor group members hoping to be officers one day.

Before the Meeting: The secretary should keep a list of the group members and their contact information and a record of their meeting attendance. The secretary helps plan meeting agendas and sends meeting reminders to the group.

During the course of the meeting, the secretary

- ❖ Takes attendance by calling roll and checking off names and/or asking members and guests to introduce themselves. He/She should ask new members to spell their names so names are recorded accurately.
- ❖ Reads the minutes of the last meeting.
- ❖ Takes minutes about what happens during the meeting.
- ❖ Leads the meeting if both the president and vice-president are absent.
- ❖ Helps the president during the meeting when needed or asked.

After the meeting, the secretary writes up the minutes and sends them to the officers for review and distribution to the rest of the group. The group can decide how detailed they want their minutes to be. Normally, meeting minutes include a list of who was present at the meeting and what important decisions were made.

Treasurer

The treasurer keeps records of the group's funds. He/she must be able to read and write, to count money, add and subtract, and be able to make deposits to the group's bank account. With the help of the advisor, if needed, the treasurer should keep records of money received and spent in a notebook (paper or online). Like the other officers, the treasurer should be able to lead by example, attend meetings regularly, and help mentor group members hoping to be officers one day.

Before the Meeting: The treasurer prepares a brief report that lists basic facts such as how much money is in the group bank account, how much money was received during the month from donations and other sources, and how much money was spent. This is called the treasurer's report.

During the course of the meeting, the treasurer:

- ❖ Reads the treasurer's report at the meeting.
- ❖ Collects dues and keeps records if the group has decided to collect dues from members.
- ❖ Keeps members informed about the group's rules for spending money.
- ❖ Leads the meeting if the president, vice-president, and secretary are absent or unable to lead.
- ❖ Helps the president during the meeting when needed or asked.

Other officer positions

Parliamentarian/Sergeant at arms. Some groups may choose to also elect a parliamentarian. The parliamentarian helps the president and others in the group follow their bylaws and rules of order during meetings. A parliamentarian can be helpful in reminding the officer leading the meeting to call for motions to make decisions and providing information on how to carry out a motion and vote. A parliamentarian can also assist the officer leading the

meeting with monitoring discussion and reminding members to stay focused on the agenda items.

Communications Coordinator. Organizational Management Solutions recommends each group elect or appoint a communications coordinator to coordinate the marketing and communication activities of the group (A list of communication strategies for FL SAND groups is attached as Appendix V).

Group Member Roles (cheer “leaders”)

All group members are important and serve an important function in the life of a self-advocacy group. Non-officer group members should

- ❖ Attend meetings and be on time. Inform the advisor or an officer if you can't make a meeting.
- ❖ Speak up and share their ideas during the meetings. Members should focus comments on the agenda item being discussed at the time.
- ❖ Make motions, second motions, and vote on important decisions.
- ❖ Volunteer for jobs and to serve on committees.
- ❖ Be active in the projects and issues the group is working on. It's important to have a strong showing when the group has a role at community or public events.

Electing Officers

When a group is formed, the members should elect officers and decide how long the officers should serve. The length of time an officer serves is called a “term.” Most officers serve one- or two-year terms. The length of the terms and what month terms begin and end should be in the bylaws or group rules.

The entire group should decide who the officers are by voting. It is usually easier if nominations are taken at one meeting and elections held at the next. This gives persons nominated for offices time to prepare a brief speech.

Nominations

A nomination is a way to say that you would like to have a particular person be an officer. Nominees should have the qualities listed in the officer descriptions referenced earlier. This is how groups typically nominate candidates for group officers

1. Nominations are opened by saying “Nominations for the office of _____ (E.g. president) are now open.”
2. Members then nominate another member(s). The person being nominated must accept the nomination. It’s customary to check with the nominee beforehand to see if they will accept the nomination.
3. When there are no more nominations, a motion is made for that nomination to be closed. The motion must be seconded and voted upon (see voting section below).
4. Nominations for the rest of the offices are then carried out in the same way.

Voting for Officers

Each person running for office should give a speech telling why they would make a good officer and why the members should vote for them. Voting for officers should be done by secret ballot. Ballots can be prepared ahead of time with the title of the office and the names or pictures of those running for the office. Members can then select who they want to vote for.

- 📌 Note: Groups should work with candidates who may need accommodations for sharing their qualifications, such as a letter that can be read by an advisor or friend.
- 📌 After the election, former officers should assist new officers with learning how to perform the functions of their new roles.

Group Meeting Basics

Meetings range in formality and structure but most self-advocacy group meetings involve basic parts such as following an agenda, making decisions by voting, a program where members learn new skills or information, and social time, etc.

Agenda

As mentioned earlier, officers and the group advisor often meet before each meeting to plan the agenda for the meeting. Typical items included on a meeting agenda include

1. Call to order: The president gets everyone's attention and says "This meeting will come to order." At this point everyone should quiet down so the meeting can start.
2. Attendance: The secretary takes attendance by calling roll from a list of group members and checking off names and/or asking members and guests to introduce themselves. He/She should ask new members to spell their names so names are recorded accurately. Some groups use sign-in sheets to record meeting attendance.
3. Minutes: The secretary reads aloud (or has someone else read) the minutes of the last meeting and people have the opportunity to add or make corrections to the minutes. The president asks the members for a motion to accept the minutes (as read or with additions or changes). There is a vote to accept the minutes.
4. Treasurer's Report: The report is read aloud by the treasurer.
5. Old Business: The group reviews any items discussed at a previous meeting in which a decision was not made. Example: The group wants to attend a city council meeting to discuss the need for sidewalk repairs but doesn't know when the council meets. They assign a member to find out when the council meets and report back to the group at the next meeting.
6. New Business: This is a list of new items the group needs to discuss.

7. Committee or Project Reports: This is a time when committees report on their work or members in charge of a project report on the status of the project.
8. Speaker or Program: This is the time for learning new things of interest to members. If possible, this should be done in an entertaining way. Groups could consider guest speakers, a relevant video, or working on an educational project like dream boards.
9. Announcements: This is the time to remind members about upcoming events. Members can also share things happening in their lives like work, home life, hobbies, new skills, volunteering or vacations.
10. Ending of the Meeting: This is called “adjournment.” The president asks for a motion to end or adjourn the meeting. The president asks for someone to second the motion and then calls for a vote to adjourn.

Group Discussion & Decision Making

All groups have to make decisions. For instance, if there are many different advocacy issues the group wants to work on, they will need a way to decide which issue to work on at the present time even if people feel strongly about several different issues. One way to do this is with a *brainstorming and vetting* process such as the following

1. Step 1: People should share whatever ideas they have and the secretary should record those.
2. Step 2: People can vote by a show of hands on what issue they think is the most important as the list is read aloud.
3. Step 3: Remove a few of the ideas that that got the least number of votes and begin voting again. Repeat this process until the list is narrowed down to just 1 or 2 issues to tackle at this time. Save the list of projects that were removed from the list to be discussed later.
4. Discuss all sides of the chosen issues, the resources needed to address them, and any other concerns related to the issue. If more information is needed, ask people in the group or the advisor to help find the relevant information.

5. When discussing an issue, think about what small steps are needed to reach your larger goal and how long it will take. For example, if you want to hold a bake sale to raise funds to send some group members to a conference, you would need to decide a number of things, such as
 - ✓ Who will be in charge of money?
 - ✓ Who will do the cooking or purchasing?
 - ✓ Where will it be held? (Choose a location where a lot of people will see it.)
 - ✓ How will you publicize it in the community?

These discussions and your fact-finding should help the group decide which issue to tackle first.

Voting

Effective groups make decisions about issues or activities that impact the entire group by membership vote. Many groups follow *Robert's Rules of Order* for membership votes. Usually, the president does not vote unless there is a tie. *Robert's Rules of Order's* primary tool for decision-making is by motion.

A motion is a tool used to present an idea that someone would like the members of the group to consider. Sometimes motions are made when discussion produces alternatives for action that need to be voted on. Other times a motion is made before any discussion on the issue takes place. Here is *Robert's Rules'* process for voting on a motion.

1. Someone makes a motion by stating their idea to be voted on.

Example:

Mr. Smith: Madame President, I move that we form a committee to plan a disability awareness day in our town.

2. The motion is re-stated by the president who asks for the motion to be seconded by another member of the group (a "second" is required as an indication discussion of the motion is supported by more than one person).

- 📌 Note: The secretary should record the motion in the minutes exactly as it is repeated by the president.

Example:

President: *Mr. Smith has made a motion to form a committee to plan a disability awareness day in our town. Is there a second to this motion?*

Ms. Jones: *Second*

3. Once the motion is seconded, the president will open the floor for discussion of the motion/issue and call on members one at a time to share their thoughts. The chair and parliamentarian are in charge of ensuring that discussion during this time is only about the issue. Large groups may choose to set a time limit for each member's comments.
4. After discussion, the president will "call for the question," meaning it's time to vote on the motion. Options for voting include
 - a. Voice vote: President states "All in favor, say 'Aye'" (wait for response). "Those opposed say 'No.'" President announces the decision.
 - b. Roll call: President or secretary calls on each member to publicly state their vote.
 - c. Secret ballot: members vote by paper ballot.

- 📌 Note: The last motion made in each meeting is often a *motion to adjourn*.

Committees

When groups need to make decisions that require additional research and study or when activities need to be planned they may opt to form a committee to work on the task. The committee works on the task outside of regular group meetings and reports its activities and recommendations back to the group, usually during a group meeting.

Committees can be formed during group meetings. The president and/or officers typically choose a chairperson they know will do a good job and has some experience or knowledge about the task. Group members can then be asked to volunteer to serve on the committee during a group meeting. Chairing a committee is a good way for emerging leaders in the group to gain leadership experience.

Social Time

All work and no fun will make self-advocacy work dull and meetings boring. Plan some time in your meetings for group members to visit freely before or after the meeting. Some groups have refreshments after their meetings, which encourages members to stay until the end of the meeting, or go out for a meal or coffee after meetings.

Managing Group Funds

Self-advocacy groups need money to get started and maintain their activities. Section 4 below describes how groups raise funds to support their activities. Groups may need money for a variety of things, including

- Photocopying fliers and other materials
- Marketing
- Self-advocacy events
- Newsletters, if you print hard copies
- Sending members to conferences, training classes, and DD Day in Tallahassee
- Holding trainings, training materials
- Social events
- Refreshments for meetings
- Transportation to meetings

Role of the Treasurer

The treasurer of the group will be the person in charge of looking after the group's money. He/She should keep a record of all of the money that the group makes and then spends, but the group should make decisions together about how money should be spent. At every meeting the treasurer should read to the group an update of what has been made and what has been spent since the last meeting. This is called the treasurer's report. The treasurer will be in charge of depositing money into the group bank account and is usually a signor of checks for the group's bank account.

Policies & Procedures

It's recommended that groups create policies and procedures for managing their group funds. By definition, policies are rules that should be followed, especially if they are referred to in group bylaws. Policies provide accountability for how funds are spent and that spending conforms to best practices and the best interest of the group. Some suggested policies include

1. Requiring purchases over a certain amount be approved by the officers or group.
2. Identifying two people who can sign checks, one being the treasurer, the other being the president or advisor. Be sure to elect a treasurer who can manage group funds, sign checks, and keep simple books, etc. with the assistance of the advisor if necessary.
3. Not allowing an officer to write a check to him/herself. If the officer who is the responsible party for signing checks needs reimbursement for expenses, the other assigned signatory should write the check.
4. Requiring documentation for all purchases (invoices, receipts).
5. Requiring the treasurer to keep records of all funds coming in and all funds going out or spent.
6. In addition to the treasurer, have bank statements mailed to a group member and/or advisor who is not a signer on the bank account.

Spending Guidelines

When a group is getting started, it may also want to set guidelines for what types of items or activities funds can be used for. In time, you may decide to turn guidelines in to policy.

Examples of guidelines for spending group funds include

1. While the group is getting established, limit spending to basic supplies, marketing and recruiting activities, and advocacy projects only.
2. Decide if funds should be spent on refreshments and, if so, set reasonable limits. Spending funds on refreshments can eat up a group's budget quickly. Many groups recruit allies to donate refreshments or have members sign up to bring drinks and snacks to meetings.

Section 4: Group Activities and Projects

Self-Advocacy Activities & Projects

Although there are many benefits to being a part of a self-advocacy group, the mission of the group is grassroots advocacy. Groups should always be working on at least one advocacy endeavor. Self-advocacy projects can be as simple as visiting a local or state politician in their hometown office, or as elaborate as planning a local Developmental Disabilities Awareness Day.

Identifying Issues

Projects typically start with issues that are important to members of the group. An issue is a topic, point, or problem that affects members of your group. Discussion of issues at self-advocacy meetings is important because

- ❖ Working on issues motivates members to stay involved.
- ❖ Working on issues keeps members informed about things that affect their lives.
- ❖ Working on issues gives the members hope that change can happen and that they can help make change happen.
- ❖ Self-advocates learn how to work as a team to solve problems and tackle issues.
- ❖ Making a difference about certain issues shows self-advocates that they have power in their lives.

Types of issues self-advocacy groups tackle, include

- ❖ Closing institutions and assisting people with disabilities who want to live independently
- ❖ Accessing local transportation
- ❖ Finding jobs
- ❖ Supporting independent living
- ❖ Improving accessibility to local buildings, walkways, and services
- ❖ Learning about rights

- ❖ Ending abuse and violence
- ❖ Getting people with disabilities to vote
- ❖ Rights to have relationships and discussion about sexuality
- ❖ Affordable health care
- ❖ Access to affordable housing
- ❖ Financial health
- ❖ Mental health
- ❖ Provider rate pay
- ❖ Bullying
- ❖ Special education, higher education, transition to job opportunities

When prioritizing issues to address, groups can ask these questions

- ❖ Do group members care about the issue?
- ❖ Does the problem surrounding the issue have a solution that can be solved in the near future?
- ❖ Is it a current issue and/or urgent issue?
- ❖ Is the issue simple and specific?
- ❖ Does the issue involve most people in the group?
- ❖ Will addressing the issue draw attention to the group; will addressing it help recruit members and build the group?

Here's an example that applies some of the questions mentioned above to the issue of public transportation.

- ❖ A good issue affects many people in the group: A large number of people with intellectual and developmental disabilities do not drive and therefore depend on alternate means of transportation to live their lives. This issue affects not just people in the self-advocacy groups but in the disability community at large. Therefore, any projects intended to improve access to and the affordability of transportation would be worthwhile.
- ❖ A good issue has a feeling of urgency and has reasonable solutions: In most cities, even small ones, public transportation, para-transportation, and smooth walkways for wheelchair users are issues government officials are accustomed to hearing about. With the popularity and affordability of ride-

sharing (Uber, LYFT), some state transportation authorities and local governments are looking into partnering with these companies to provide affordable paratransit services. This transportation issue offers multiple opportunities for self-advocacy projects. Groups can provide research to local officials about successful transportation programs in other cities, bring problems to the attention of decision-makers, and explore partnering with private companies, like LYFT and Uber, to address the transportation problems in their community.

Examples of Local Advocacy Activities & Projects

- ❖ Wheelchair challenge: Groups ask local officials and community leaders to use wheelchairs for a day to raise awareness about the challenges of wheelchair users.
- ❖ Visit state and federal legislators at their hometown offices.
- ❖ Advocate and partner with local business leaders to solve community problems.
- ❖ Host town hall-type meetings to discuss disability issues.
- ❖ Utilize local and social media to raise awareness about activities and issues.
- ❖ Coordinate voter registration drives and training.
- ❖ Coordinate community-based Developmental Disability Awareness Days (see FDDC “how to guide” at www.fsacentral.org > Resources > Policy & Legislative Action).
- ❖ Attend local government (city council, county commission) meetings to voice concerns about local problems affecting people with disabilities.
- ❖ Have a booth at community events to recruit members and raise awareness about self-advocacy and disability issues.
- ❖ Members serving on community boards, task forces, councils, and work groups to encourage consideration of people with disabilities in addressing community problems and planning events (chamber of commerce, transportation authorities, housing boards, school board committees, arts council, recreation boards, Family Care Councils, etc.). Local groups can

apply for FL SAND mini-grants to support participation on local boards (See www.flsand.org >About>Training).

Education and Training

FL SAND facilitates self-advocacy, leadership, fundraising, and other relevant training for all groups throughout the year via webinar and its annual conference. The slide presentations attached as appendices are from training presentations. Groups are also encouraged to pursue training independently at the local level and can apply for funds to support local training (See www.flsand.org >About>Training). New groups should contact OMS to discuss introductory self-advocacy training.

Giving Back: Community Service Projects

It's always a good idea for groups to serve their communities in some capacity. Community service activities also serve to raise awareness about the local group and disability issues and provide opportunities for the community to see self-advocates in action.

Examples of FL SAND group community service projects include

- ❖ Abilities Venti developed an anti-bullying drama program that they perform at schools.
- ❖ New Horizons mentors school children with disabilities in Tampa.
- ❖ Elephant Herds awards a public transportation pass annually to someone in the community with a disability -- The Dalton Belles Award.
- ❖ Village Voices volunteers at community events.
- ❖ Self-Advocates of East Volusia purchases Mother's Day gifts for victims of domestic violence.

Fundraising

Groups will need to raise funds to support their self-advocacy activities and sustain the group for years to come. Members should discuss how much money they think they may need for their activities and then discuss ways they would like to raise money (See Appendix VI for more details on how groups can build an effective fundraising program).

To get started, groups could make a list of things they need money for, including activities and advocacy projects they'd like to work on. Activities should be categorized according to 1) things they can do without funds; 2) things that require a small amount of money; and 3) activities that will require significant funding. Then prioritize what items on the list are most important and what can be left until later.

Next, make a list of ways your group can raise money and which will work best for your group and its resources. Groups have a variety of options for raising funds. These include

- ❖ Membership dues.
- ❖ Private donations: Organizations or individuals with an interest in disability issues may donate money to your group or to help sponsor an event (See Appendix VII for training on asking community friends and businesses for support). These donations are typically received based upon a personal relationship between the donor and a group member. These relationships can be cultivated in the hopes of the donor becoming a long-term friend of the group and repeated giver.
- ❖ Letter-writing campaigns/annual giving: Many nonprofit groups compile a mailing list of allies, friends, family members, and other stakeholders that they may send newsletters to from time to time to report on the group's activities and achievements. This list can also be used to ask for yearly donations.

- ❖ Grant awards: Grants are money received from a government agency, company, private association, or individual. Grants generally require an application and for the group to carry out a particular task.
- ❖ Events: Events range from simple things like bake sales and car washes that involve few up-front expenses to elaborate events that require months to plan such as 5Ks, dance-a-thons, or black tie galas.
- ❖ Selling merchandise: The group may want to sell things on an ongoing basis like t-shirts or promotional items with self-advocacy or disability rights messages.
- ❖ Speaking engagements: Self-advocates sometimes get paid to speak at conferences or other community events.

Different ways of raising money take different amounts of commitment from members, advisors, and allies. For example,

- ❖ Asking for dues is simple and does not take a lot of work from group members but typically does not result in a significant amount of money unless the group is very large.
- ❖ Dances, 5Ks, and galas with auctions can take a lot of energy and upfront investment but, if planned and advertised well, have the potential to raise more money at one time and members will have a good time in the process. Annual events also have the potential to generate buzz and raise friends in the community that may translate into major gift donors.
- ❖ Applying for a grant takes a lot of time and effort and is not much fun – but, you may learn a lot and get a lot more money.
- ❖ If you organize a workshop to help people learn about self-advocacy skills and charge a fee to come, you will do two things at once: raise money and help people learn about self-advocacy.
- ❖ Selling items is something your group can work on over time. The keys to success here are choosing items that will appeal to a wide variety of people and having access to locations where people will see your item.

The Group that Plays Together Stays Together: Social Activities

While self-advocacy is the primary mission of FL SAND groups, as mentioned previously, local groups provide an environment for self-advocates to have fun and gain mutual support. Most groups schedule regular social activities such as hikes, bowling parties, and holiday celebrations.



Contact Us!

Still have questions? We're here to help. Contact FL SAND officers, local group leadership, and Organizational Management Solutions via the FL SAND website at www.flsand.org or by emailing us at contactflsand@gmail.com.

General information about self-advocacy and the self-advocacy movement in Florida can be found at FL SAND's news and information hub, Florida Self-Advocacy Central / www.FSACentral.org.

Appendices

- I. Group Application to Join FL SAND
- II. Role and Responsibilities of the Group Advisor
- III. Mission Statement and Goal-Setting Exercises
- IV. FL SAND Bylaws & Election of Officer Procedure
- V. Local Group Communication Strategies
- VI. Building a Diverse Fundraising Program
presentation slides
- VII. Fundraising and Conference Sponsorship
Training

FL SAND Grassroots Group Membership Application

Group Application to Join Florida Self-Advocates Network'D (FL SAND)

Date of Application:

Name of Group:

Location of Group:

Contact information (phone & email)

Group leader(s):

Advisor:

Do you have a regular and accessible place to meet? Where?

Do you have a core group of founding members?

How many?

Why do you want to join FL SAND?

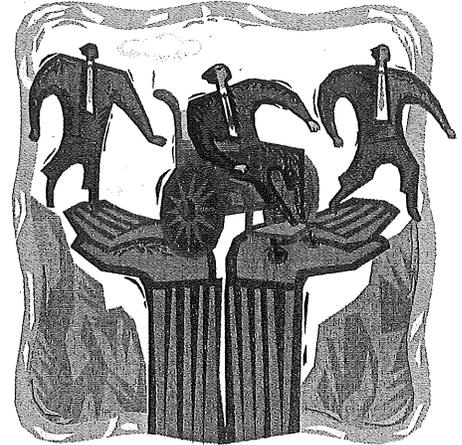
How do you plan to recruit members to your group in the next 3-6 months?

Please provide at least 3 goals you'd like to accomplish in the first year after the group's acceptance to FL SAND?

Working with An Advisor

What is an advisor?

- An advisor is someone who helps you and your group to do things you want to do.
- Sometimes advisors are called support or resource people.



Who can be an advisor?

- An advisor believes that people with disabilities are people first.
- An advisor believes that people with disabilities have a right to speak out for themselves.
- An advisor believes that self-advocates can do the things they want to.
- Some groups have one or more advisors; advisors may or may not have a disability.

Your advisor may be:

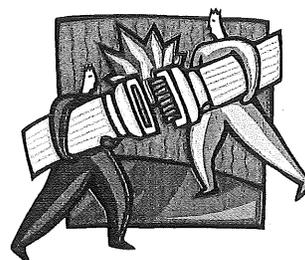
- A friend of a group member
- A volunteer
- A family member
- A student
- Someone who works in the community



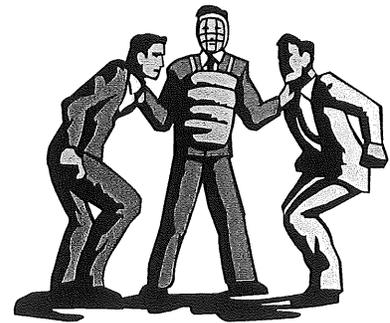
Adapted from: Learning About Self-Advocacy, Booklet 2, p. 16

Advisors should:

- Believe in, recognize, and foster the abilities of all members
- Understand why people join the group
- Recognize and foster the goals of the members
- Help members work together and solve problems
- Help the group find other people who can provide resources and support as needed
- Help connect members with the community
- Help members develop leadership skills



- Help people develop skills for understanding and communicating
- Support the diversity of the group, and find ways for different interests to be used most effectively
- Help people link their individual self-advocacy efforts with group and national self-advocates
- Understand that they are not in charge, and should find a system for advisor support and evaluation
- Support the group to develop networks of other advisory support in case they are unable to continue
- Recognize and avoid any conflict of interest
- Avoid depending on money or agency support for self-advocacy to grow.



Adapted from: People First of Nebraska State Convention, 1993.

Group Meetings: The Role of the Advisor

- An advisor can help find a place for the group to meet and discuss with the group any particular needs individuals may have so the space is fully accessible.
- The advisor can help group members set up transportation, or may even help to provide transportation.
- The advisor can help coordinate social activities, refreshments, or outside films and speakers for the meetings.
- The advisor can help in finding information on a particular topic; he or she can present this information when asked by the group.
- The advisor can help officers and group members with tasks such as writing, reading, and banking when requested by group members.
- The advisor should understand the principles of self-advocacy, and can help group members learn these principles.
- The advisor should not be more involved in meetings than necessary and should encourage maximum participation of group members.



- The advisor and other group members can support self-advocates' needs when necessary, or requested.

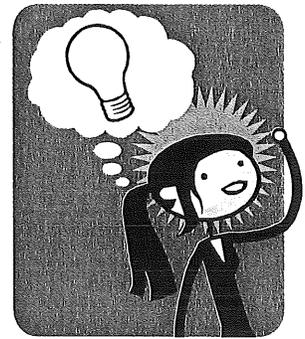


- The advisor should be present and on time to all meetings.

Assisting Group Members to Develop Skills:

The advisor can assist group members to develop certain skills. These skills can often be worked on during officers meetings. When self-advocates understand skills, the advisor can let the leaders and group members teach others. These skills include:

- How to help the group stay on task.
- How to support everyone's participation in the group's discussion.
- How to lead group discussion.
- How to speak and dress for radio, television, or community presentations.
- How to prepare a speech.



- How to write a letter.
- How to reinforce appropriate statements, ideas, and questions from group members.
- How to research and develop technical skills.
- How to learn to manage group money, and conduct banking procedures.



Self-Advocates and Advisors Should:

- Sit down together and come up with a plan about how they want to work together.

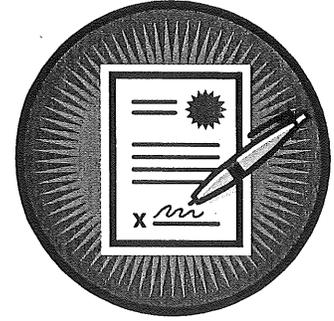


For example:

- How will the advisor take part in the meetings?
- What are the needs of the group that the advisor can help with?
- Do you want the advisor to take notes, and help with money in the beginning?

It is helpful to:

- Have officers and advisors come up with a written contract about the role of the advisor.
- The contract should include reasons why a group may want to ask an advisor to leave.
- This contract should be shared with and signed by all advisors and members of the group.
- The group members should also come up with a plan of how they may find a new advisor; this may include steps related to interviewing for advisors.



Activity Steps to Help Develop a Plan:

1. Self-advocate leaders (with support as needed) and advisors spend time together and make separate lists of:
 - qualities they think make a good advisor
 - things that the advisor can be helpful with for their group
 - things that the advisor could do that may harm the group.
2. Take turns and discuss what they have written on their lists.



3. Write down how the responses were similar, and how they were different.
4. Brainstorm together what kinds of things should be in the plan for the advisor.
5. Outline the plan and discuss the plan with all the group members.
6. When all group members understand the plan, write down the details.
7. Have all group members vote on accepting the plan, and have all self-advocates and advisors sign the plan.
8. This plan will be the contract between the group and the advisor.



Ten Questions to Ask Yourself as an Advisor:

1. Am I really listening to what self-advocates have to say or am I imposing my point of view?
2. Do I see the real human growth and potential in self-advocates or do I see “disability” and “limitations”?
3. Have I “checked out” my actions and feelings with self-advocates?



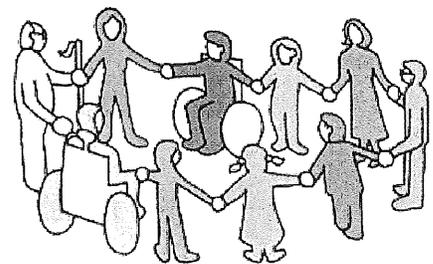
4. Are any of my actions based upon a potential “conflict of interest” or need to be “controlling” in any way?

5. Do my actions:

- Increase the self-respect, self-confidence, and self-reliance of self-advocates and encourage them to take risks?

- Decrease the self-advocates’ dependence on me?

- Increase a “peer support” system and encourage self-advocate leaders to take over some of my roles?



- Help teach people a “process” for making decisions, solving problems and doing things on their own instead of controlling things?

- Increase the self-advocates’ opportunities to understand and participate in the decisions that will affect their lives?

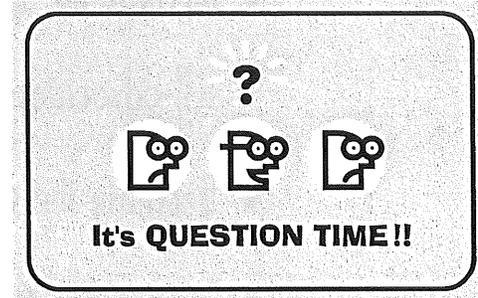
- Encourage a positive role for diverse membership?

6. Do my actions promote, respect, and recognize individual growth as well as group spirit?

7. Do my actions encourage and assist self-advocates in obtaining and understanding a wide variety of information and different points of view so that people can make informed decisions?

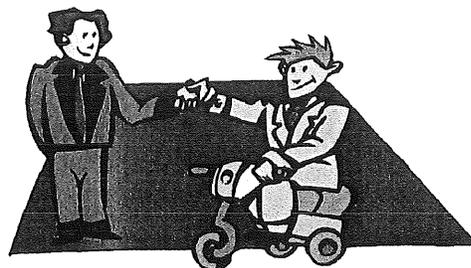
8. Is it okay for self-advocates to:

- Question my point of view?
- Work me out of a job?
- Tell me that they don't need me and can decide on their own?
- Give me negative feedback about what I am doing?
- Not see me as an "authority figure?"



9. Do I realize that advisors as well as self-advocates are human beings capable of making mistakes and having problems just like anyone else in any other organization?

Adapted from Cindy Rhoades and Philip Browning Training Manual



Activities For Training Advisors:



1. Discussion between self-advocates and advisors:

- Have self-advocates share past experiences with advisors and each other.
- Have them share experiences when people tried to make too many decisions for them.
- Have someone record any issues that are raised in this activity.
- Have advisors and self-advocates discuss these issues.

2. Set up a role-play:

- Have advisors and self-advocates play their natural part in a meeting setting.
- Have the advisor play both a negative advisor and a positive advisor.
- Have the advisors and self-advocates switch roles and carry out the same role-play.
- Have a follow up discussion about how the different interactions felt to both the self-advocates and the advisor.

Exercise #1 {20 Minutes}

Forming Your Own Mission Statement

Read over the following Mission & Vision Statement from the Self-Advocacy Association of New York State. Use this example to guide your answers to the questions below:

Mission {Purpose}

The Self-Advocacy Association of New York State is a strong voice for and by people with developmental disabilities promoting independence, empowerment, leading by example, communicating, networking and encouraging each other.

Vision {How You Accomplish Your Purpose}

The Self-Advocacy Association of New York State is an organization led by people with the challenge of a developmental disability to assure the civil rights and responsibilities that include the opportunities and choices of equal citizenship.

The Association accomplishes this by:

- ♦ educating
- ♦ advocating
- ♦ supporting
- ♦ networking
- ♦ communicating
- ♦ promoting respect and dignity
- ♦ sharing information and resources
- ♦ improving quality of life

Questions:

1. Why are you joining a Self-Advocacy group?
2. What do you hope to get from being a member of a Self-Advocacy group?

Compare & contrast answers with each other and brainstorm a hypothetical mission statement within your group.

Exercise #3 {20 minutes}

Setting Goals/Creating a Plan

Goals are important for personal growth, and increasing self-esteem or pride in yourself. That is why goals need to be manageable and realistic. Goals within a group need to relate to every member's abilities, interests, and opinions. Examples of projects or goals that some groups have worked on are:

- *changing the name of an agency
- *organizing events
- *volunteering
- *public education
- *letter writing campaigns
- *fund-raising

1. Every self-advocate list one goal or project that you personally would like to work on in your group.

List all the ideas on one piece of paper, and Pick One goal which reflects every member's input, and that the majority of people in the group wish to pursue or take on.

2. Once the group has picked one goal or project it needs to be broken down into steps of action. List the ways in which the group will start to work on the goal.

**Remember to take little steps when developing your plan of action.

3. Long-term Planning: When the stepping-stones are identified the group should brainstorm how this goal fits into a hypothetical 6-month plan for the group's activities.

~How will the group work on this goal together over the next 6 months?

~List the barriers that the group might come up against when working towards this goal, and ideas on how to break them down.

Barriers:

Possible Solutions:

**By-Laws
Of the Florida Self-Advocates Network'D
(FL SAND)**

First Revised December 9, 2011,

2nd Revision by committee: August 2014

**3rd Revision by Executive Board committee; adopted by Board of Directors
June 17, 2017**

Mission

Florida Self-Advocates Network'D (FL SAND) is a statewide association led by Self-Advocates who are united and active in speaking up for themselves, promoting rights, advocating for system change, and creating community inclusion and awareness of its members.

Vision

Florida Self-Advocates Network'D (FL SAND) will achieve freedom, independence, and equal rights with united voices and the power of sharing information. FL SAND will play an important leadership role in forming positive and healthy partnerships with businesses, organizations and government, with the ultimate goal being inclusion for all.

Purpose

The purpose of Florida Self-Advocates Network'D (FL SAND) is to support local grassroots organization, expand the Florida self-advocacy movement, provide a united voice for statewide issues and topics that are important to Florida Self-Advocates, create community awareness, and promote inclusion for all.

Article I – Organization

Section 1. Name. Florida Self-Advocates Network'D (FL SAND) - henceforth referred to as FL SAND

Section 2. Offices. 1542 Kingsley Ave. #136, Orange Park, FL 32073

Section 3. Fiscal Year. (FL SAND) shall begin October 1st and end September 30.

Section 4. Regions. State of Florida.

Article II – Membership

Section 1. General Membership shall be open to Self-Advocates who demonstrate interest in the mission of FL SAND. Members may vote on certain issues as decided by the Board of Directors.

Non-voting members are friends, family members, professionals, advisors, and other persons or organizations who support the goals of FL SAND and request participation as a non-voting member.

Section 2. Groups. Any self-advocacy group which organizes in Florida can request recognition from the Board of Directors by completing the application process. The group must meet the following criteria:

- Mission is similar to FL SAND's mission
- Elect their leaders – president, vice-president, etc.
- Choose their own advisor(s)
- Develop their own agenda and activities.
- Purpose of the group is self-advocacy activities.
- If affiliated with an agency, remains independent of that agency and the way that agency functions.
- Maintains membership records.

Section 3. Membership Dues. Dues payable to the organization by members in each category will be determined by the Board of Directors. Exceptions can be made to waive monetary fee for the exchange of services to FL SAND.

Article III – Meetings

Section 1. Meetings shall be three kinds: Board of Directors meetings, General Membership Meeting, and Special Meetings. Meetings are planned by the Board of Directors, generally by the Executive Board

Section 2. The Board of Directors meetings shall be held at a time and place designated by a majority (51%) of the Executive Board. The Board of Directors will meet a minimum of two meetings per year. Board members may participate in any Board meeting by an alternate format pre-approved by the Board.

Section 3. General Meeting – One annual meeting shall take place at a time designated by the Board of Directors. Alternative format of meetings will be acceptable substitutes for traditional meetings (Skype, web cast, video conference, etc.).

Section 4. Special meetings may be called by or requested by a majority vote (51%) of FL SAND membership, by a majority vote (51%) of the Board of Directors, or by the President of the Board and or Executive Board.

Article IV – Board of Directors

Section 1. The Board of Directors shall consist of one representative from each of the groups affiliated with FL SAND. Each group will determine their Representative and Alternate. The business of the organization will be managed by the Board of Directors.

Charter Members:

- Abilities Venti (Pembroke Pines)
- Self-Advocacy for Independent Life (Boynton Beach)
- Central Florida Self-Determination Advocacy Council
- Elephant Herds (Panama City)
- Suwannee River Self-Advocacy Consortium
- New Horizons Support Group (Tampa)
- People First of South Florida
- Self-Advocates of East Volusia

- Stand-up For Independence (Hobe Sound)
- Voices Heard (Ft. Myers)
- Advocates Reaching Community (Jacksonville)
- Santa Rosa Transforming Lives

Expansion of affiliated groups will be reflected by increasing the number of members to the Board of Directors.

Section 2. Terms. The term of office shall be two years. Board members may serve for two consecutive terms. The term is from October 1st to September 30th of the second year. Eligibility for reappointment, at this time, will be determined by the Board of Directors.

Section 3. All decisions made by the Board of Directors shall be a majority vote (51%).

Section 4. A quorum of 51% of voting members of the Board of Directors shall be required for all decisions made by the Board of Directors at meetings or via alternate channels (e.g. email) in special circumstances. Important decisions of an emergency or urgent nature can be decided by a majority (3 members) of the Executive Board.

Section 5. Removal of Board Members. The Board of Directors can decide to remove an Officer or Board member with a majority vote of the Board. Causes for removal will be decided by the Board of Directors. Reasons for removal may include but are not limited to: move out of state, missing 3 meetings without just cause as determined by board on a case by case basis, misconduct in representing FL SAND, rules infraction during board meeting (1st infraction: warning; 2nd time: written reprimand; 3rd time: removal).

Section 6. Advisors to the Board. Advisors are non-voting participants. The role of the Advisor shall be to support and assist board members in preparation for meetings, during FL SAND meetings, and with activities throughout the year. Each group only gets one vote. In cases where the Advisor is a Self-Advocate, the role is as an Advisor. An advisor who is a self-advocate can serve as an alternate and vote if the regular board member and alternate are not in attendance.

Section 7. Compensation. No member of the Board of Directors shall receive compensation for services. Compensation is considered money, goods or services. Compensation does not include reimbursement for expenses related to performing activities performed as a board member. Any money a board member receives while representing FL SAND (i.e. speaking engagement) will be deposited into the FL SAND account and the board will decide on how to spend it.

Section 8. Representation of FL SAND. Board members wishing to formally represent FL SAND as speakers; by serving on a board or other group; or by writing letters, blogs, or editorials on behalf of FL SAND, must seek approval from the Executive Board.

Article V – The Executive Board

Section 1. The Executive Board shall consist of five (5) positions. President, Vice-President, Secretary, Treasurer, and Parliamentarian.

Section 2. Elections. At one of its meetings each year, the Board of Directors will elect the members of the Executive Board. Officers shall be elected for a term of two years. No officer shall serve more than two consecutive terms in one position. The term is from October 1st to September 30th of the second year. Elections will be governed by policies and procedures in the FL SAND Tool Kit and Handbook.

Section 3. Vacancy. If a vacancy in an elected officer position should arise (except President), a Board member who is not an officer shall be appointed by the President to complete the unexpired term of office, subject to Executive Board approval.

Section 4. Duties of the Executive Board

The Executive Board has all powers and duties of running FL SAND according to the priorities set by the Board of Directors.

President – The President shall preside over business meetings and any other meeting of the general membership. He/she shall appoint the chairpersons of all committees and may appoint special committees as required.

Vice President – The Vice-President shall succeed the Presidency in case of a vacancy in that office and shall perform the duties of the President in his/her absence.

Secretary – The Secretary shall ensure that a record of all proceedings of all meetings of the Board of Directors is maintained.

Treasurer – The Treasurer shall ensure that a complete and accurate account of all funds received and disbursed is maintained.

Parliamentarian – The Parliamentarian shall provide resources and assistance to the President and assist with maintaining order of all the meetings.

Section 5. Advisors and Support Staff. Each of the officers shall have available the necessary supports needed to fulfill the duties of his or her position.

Section 6. Resignation or Removal of Officer. Any Officer who resigns must do so in writing or by alternate format. Any Officer elected or appointed to office may be removed by the Board of Directors whenever in their judgment the best interest of this organization will not be served.

Article VI – Amending the By-Laws

The by-laws of the FL SAND may be amended, repealed, or added to, or new by-laws may be adopted by a majority vote of the Board.

FL SAND Board of Director Officer Elections Procedure

Per FL SAND Bylaws, officers are elected for two-year terms.

Article IV. Section 2 Terms: *The term of office shall be two years. Board members may serve for two consecutive terms. The term is from October 1st to September 30th of the second year. Eligibility for reappointment, at this time, will be determined by the Board of Directors.*

Article V. Section 2 Elections: *At one of its meetings each year, the Board of Directors will elect the members of the Executive Board. Officers shall be elected for a term of two years. No officer shall serve more than two consecutive terms in one position. The term is from October 1st to September 30th of the second year. Elections will be governed by policies and procedures in the FL SAND Tool Kit and Handbook.*

Article V. Section 4. Duties of the Executive Board

The Executive Board has all powers and duties of running FL SAND according to the priorities set by the Board of Directors.

President – *The President shall preside over business meetings and any other meeting of the general membership. He/she shall appoint the chairpersons of all committees and may appoint special committees as required.*

Vice President – *The Vice-President shall succeed the Presidency in case of a vacancy in that office and shall perform the duties of the President in his/her absence.*

Secretary – *The Secretary shall ensure that a record of all proceedings of all meetings of the Board of Directors is maintained.*

Treasurer – *The Treasurer shall ensure that a complete and accurate account of all funds received and disbursed is maintained.*

Parliamentarian – *The Parliamentarian shall provide resources and assistance to the President and assist with maintaining order of all the meetings.*

Elections Procedure

The FL SAND board holds officer elections during its June meeting that currently convenes at The Family Café conference, which is held the first or second weekend in June. A June election will provide time for outgoing officers to mentor new officers prior to their taking office October 1 and convening the FL SAND General Membership meeting at the annual conference held each winter. Officers can be assisted by advisors or mentors in performing their duties. The elections process is as follows.

1. No later than 30 days prior to the June meeting, board members wishing to run for office must submit their intent to run to the Executive Board and FL SAND provider. Intent to run must be

submitted via email to contactflsand@gmail.com. The intent to run email must contain the candidate's name, FL SAND group, office running for, and contact information (email and phone number).

2. Board members, advisors, group leaders, and FL SAND members who have signed up to receive the FL SAND newsletter will receive the list of candidates prior to the June board meeting.
3. Candidates should plan to give a speech/presentation at the June meeting sharing why they believe they are best qualified for the position and that they have the abilities to hold the office. Officers can be assisted by advisors or mentors in performing their duties. Speeches should be no longer than two (2) minutes unless extra accommodations of time are necessary. Candidates running for office should make every effort to attend this meeting in person but will be allowed to give their speech over call-in line. Candidates are not required to give a speech but it is highly recommended.
4. Elections by secret ballot will take place immediately after the speeches among board members or designated alternates. Each group gets only one vote.



“Speakin’ Out” to Stay Connected – FL SAND Communication Strategies

Now that FL SAND is active again, we need to

- Be better connected to each other; and
- Encourage other self-advocates to learn about self-advocacy and join a FL SAND group

These are tips for keeping your group members connected to other FL SAND groups and group members connected to each other.

1. Assign a group member to be your “Communication Director.” This should be someone who enjoys social media and knows how to use social media and email. The communication director shouldn’t be the only group member who uses social media but he or she can be the one responsible for encouraging more use of social media by your group.
2. Encourage group members to join the FL SAND Facebook group and to like the Florida Self-Advocacy Central Facebook page. Remind them at every meeting. Send them an email with links to the pages.
3. Encourage members to subscribe to the flsand.org mailing list at the bottom of the web page and to check the FSACentral.org for news.
4. Collect email addresses from group members and regularly send out communication between meetings, or create an email newsletter. If a large number of your group uses text messaging, find a text announcement service that will let you send out text announcements. Be wary of simply using “text groups” as replies to group texts go to each member on the list.
5. Recruit an ally from your community who can train members how to use social media safely and effectively.
6. Encourage group members to share FSACentral.org articles with their Facebook friends. They can do this from the website or the FSACentral Facebook page.
7. Post reminders for you group meetings on the FL SAND Facebook page – even though the meetings are just for local members, meeting announcements will convey to page visitors that FL SAND groups are active and thriving.
8. Post pictures from group meetings or activities.
9. Post updates about group member achievements.
10. Don’t leave your bros hangin’: “Like,” “Share,” and respond to others’ posts and comments on the FL SAND Facebook page. Engage in conversation. These actions push FL SAND content out to your Facebook friends and draw more attention to the page.
11. Comment on stories posted on the FSACentral Facebook page. Share whether you agree or disagree with the points in the story and/or how it relates to your experiences as a self-advocate. Contribute new ideas that weren’t mentioned in the article.
12. Don’t worry about repeating messages in email and Facebook. Repetition will help members remember important information.
13. Use all of the above tips to build interest and excitement for the FL SAND Annual Conference.

IMPORTANT: Although email, social media, and text-messaging are quickly surpassing the telephone as the primary means of connecting with friends and family, be sensitive to the needs of members who don't yet use these new sources. Keep a list of members who need phone call reminders and assign a member to keep them in the loop.

Speakin' Up & Movin' Out



**FL SAND
Annual Conference
2017**

**BUILDING A DIVERSE
FUNDRAISING PROGRAM**
JANUARY 7, 2017
DELIVERED AT FL SAND ANNUAL CONFERENCE

1

INTRODUCTIONS: KATHY LEIGH

- Presenter & Moderator, Kelli Munn with Organizational Management Solutions and Kelli Munn PRM
- Troy Munn, Major Gifts Fundraising Consultant
- Erin Hyne, SUFI Member
- Eddie Hall, FL SAND Vice President and PCSAA Member

2

OUTCOMES OF THIS TRAINING

1. For groups to think more strategically about their fundraising
2. For groups to begin working on relational giving – “Friend-raising”

3

WHAT DOES IT MEAN TO THINK STRATEGICALLY

- Choosing fundraising events or a mix of events that achieve multiple goals: When we raise funds we should **also** be raising . . .
 - Awareness about our group, self-advocacy, and disability issues
 - Friends (allies) who can assist us with our needs and goals
- Choosing fundraising events that will give us the most awareness and funds for the least amount of effort or resources (return on investment).
- Plan what you need funds for

Work smarter and harder . . .

4



TYPES OF FUNDRAISING

Item sales (candy, candles, t-shirts, raffles, etc.)

- **Resources Needed – Moderate**
 - Multiple people
 - Money to buy items or supplies
 - What else?
- **Return – Low to moderate**
 - Can do OK if you have a lot of folks to sell
 - Works well for large groups

6



TYPES OF FUNDRAISING

Small, simple events (car washes, bake sales, etc.)

- **Resources Needed – Moderate**
 - Moderate number of people
 - Low planning time, some advertising
 - Money to buy supplies
 - What else?
- **Return –**
 - High awareness with good location
 - Generally, not big money makers

8



TYPES OF FUNDRAISING

Special events (auctions, banquets, golf tournaments, etc.)

- **Resources Needed – Very high**
 - Moderate number of committed people
 - Lots of planning time, months
 - Significant up-front cash needed
 - Significant advertising, promotion required
 - What else?
- **Return – Potentially very high**
 - High return on awareness, cash, and “friend-raising” if done well

10



TYPES OF FUNDRAISING

Sponsored Raffles (high-end, donated item)

- **Resources Needed – Low to moderate**
 - Low number of people to plan, low to moderate to sell tickets
 - Must have appealing item
 - Business and advertising partners
 - Minimal up-front cash
 - What else?
- **Return – Potentially high**
 - High return on awareness and cash

12

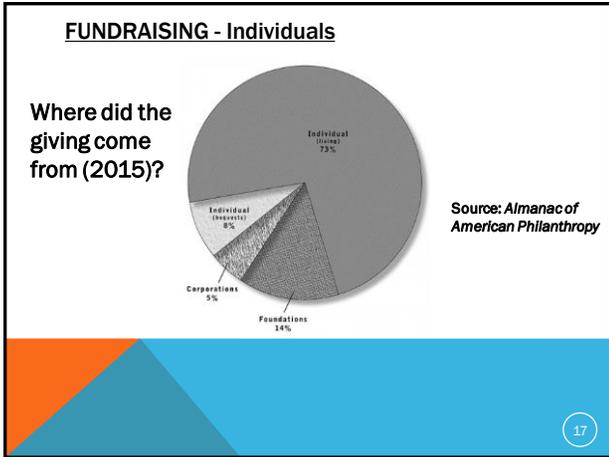


TYPES OF RELATIONAL GIVING

- **Annual Giving:** establishing relationships with donors who will give a yearly donation (lump sum, monthly drafts, etc.).
- **Major Gifts:** involves face-to-face asking for donations for a specific purpose or project – individuals & business
- **Planned Giving:** donors naming charities in their estate documents (wills, trusts, etc.) to receive funds after their death.
- **Campaigns:** Fundraising effort to raise a specific amount of money for a specific purpose(s) over a specific period of time; have a life span

“Friend-raising.”

16



FUNDRAISING - Individuals

- **Annual giving** - direct mail, telesolicitation, online/social media; generally smaller amounts and is least personal form of fundraising
- **Major giving** - contributions made at certain thresholds; highly personal form of fundraising
- **Planned giving** - contributions made through wills, trusts and other legal means; highly personal form of fundraising; generally involve collaboration of donor, charity and attorney

18

FUNDRAISING - Individuals

Why do people give?

- It makes them feel good; feel like they are making a difference
- Leaving a legacy
- Belief in your organization's mission
- Americans are generous; 2015 - \$373.25 billion donated (source: Giving USA), largest giving year ever

Other reasons (but not significant)

- Tax deductions
- Naming opportunities

BIG REASON - "Someone asked me."

19

FUNDRAISING - Individuals

- Fundraising is transactional, yet is also **relational**
 - People → People
- **Keys to making the ask to individuals**
 - You're really not asking someone to give money; you're **inviting** someone to join you in your mission
 - Make asking personal (face to face, phone)
 - Never take "no" personally; ask about another amount

20

KEEP THINGS SIMPLE

- Decide **who** you're going to ask
- Decide **who** will be doing the asking
- Decide **what** you're going to say
- Create a **process** that works for your group



Organizational Management Solutions can provide specific training in major gift solicitation and business sponsorships!

21

FUNDRAISING - Individuals

WHEN PEOPLE GIVE TO YOUR ORGANIZATION, NEVER FORGET THE 6 MOST IMPORTANT WORDS IN FUNDRAISING...

22

FUNDRAISING - Individuals

WHEN PEOPLE GIVE TO YOUR ORGANIZATION, NEVER FORGET THE 6 MOST IMPORTANT WORDS IN FUNDRAISING...

THANK YOU, THANK YOU, THANK YOU!

23

QUESTIONS FOR ERIN HYNE & EDDIE HALL

Erin

- How did you establish a relationship with Home Depot?
- Who did you meet with and were you able to tell them about self-advocacy?

24

Eddie

- Tell us about successful fundraising programs your group has implemented?
- How does your group's fundraising support your self-advocacy efforts?

25

Eddie & Erin

- What advice would you give self-advocates seeking donations from individuals and businesses?

Questions from the audience?

26

RESOURCES AT YOUR DISPOSAL

- OMS: Tina and Kelli – contact us any time
- contactfilsand@gmail.com
- Troy is available for one-on-one training and advice

HELP



27

Speakin' Up & Movin' Out
 5th Annual
FL SAND
 Conference

Florida Hotel and Conference Center / Orlando / January 6-8, 2017

FUNDRAISING & SPONSORSHIP TRAINING 2017
 DELIVERED BY ORGANIZATIONAL MANAGEMENT SOLUTIONS

1

INTRODUCTIONS

- Presenter: Kelli Munn with Organizational Management Solutions and Kelli Munn PRM
- Participant introductions

2

TYPES OF FUNDRAISING

- Sales (candy, candles, t-shirts, bake sales, raffles, etc.)
- Events: car washes, bake sales, etc.
- Special Events (involve sponsorships, pledges, major gifts): banquets, golf tournaments, concerts, etc.
- Annual Giving: establishing relationships with donors who will give a yearly donation (lump sum, monthly drafts, etc.).
- Planned Giving: donors naming charities in their estate documents (wills, trusts, etc.) to receive funds after their death.
- Major Gifts: Involves face-to-face asking for donations for a specific purpose or project.
- Capital Campaigns: Extended length campaigns to generate funds for buildings and special projects

3

KEEP THINGS SIMPLE

- Decide **who** you're going to ask
- Decide **what** you're going to say
- Create a **process** that works for your group

Fundraising is about building relationships. Think of it as

“Friend-raising.”

4

DECIDE WHO YOU'RE GOING TO ASK

- Plan with the big picture in mind
- Think of people and companies in your community who are most likely to support your group with a donation



- Vendors or suppliers that the group or group members either regularly use or work for (restaurants, salons, banks, insurance agencies, etc.);
- Doctors, dentists, and physical therapists, etc. that group members frequent or who are known to serve persons with disabilities;
- Businesses that sell goods and/or services for persons with disabilities (medical equipment retailers); and
- Business owners who have family members with disabilities.

Let's Brainstorm!



5

DECIDE WHAT YOU'RE GOING TO SAY

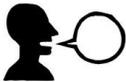
- Write a strong case statement
- A good case statement includes
 - Background information on the organization (FL SAND and your local group);
 - A compelling statement regarding your group's financial needs; and
 - How donations/sponsorships will help your group (how you will use the funds)
- Information on how donors will be recognized is important to mention (in person and in your materials).
- Be specific about the amount you are asking for

Role-playing making your group's case to a donor might be a fun and useful group meeting activity.

6

WHAT YOU CAN SAY IN A CASE STATEMENT FOR THE ANNUAL CONFERENCE

- Talk about what the conference means to group members.
- Talk about what you will learn there.
- Mention how difficult it is for group members to afford the conference because of the limited income that many self-advocates experience.



- Talk about the activities, events, and accomplishments of your group.
- Tell donors about FL SAND at the state level and its participation in Developmental Disabilities Day.
- You may need to start by explaining what a self-advocate is.

7

BE SPECIFIC ABOUT WHAT YOU ARE ASKING FOR

- Show them the sponsor sheet and ask for a specific level
- The "Shout Out" and "Cheer" sponsorships are ideal for local group "asks" but what you ask for is **totally up to your group**
- Make sure donor knows all sponsorships to FL SAND are tax deductible and they will receive a gift acknowledgement. FL SAND is a tax exempt 501(c)(3)

8

CREATE A PROCESS THAT WORKS FOR YOUR GROUP

- **Decide which self-advocates will be involved in asking for sponsorships**
 - This should be people who are comfortable meeting with people in the community and who have a relationship with the donor
 - There are other jobs for self-advocates in this process
- **Process will vary depending on donor**
 - Some companies require online forms to be completed
- **Use the FL SAND fundraising guide for help**



*Let's talk through some of the likely scenarios.
Goal is to get an appointment with a donor!*

9

TIPS FOR TALKING TO DONORS

- **Phone calls**
 - Find out who to call
 - Introduce yourself: name, group name, why you're calling, call back number if leaving message
 - Be brief and practice with a friend ahead of time
- **Face-to-face meetings**
 - Dress for success
 - Take your materials (letter and sponsor sheet)
 - Practice your case statement ahead of time
 - Practice your "ask" ahead of time
 - Should anyone come with you?

10

RESOURCES AT YOUR DISPOSAL

- Tina and Kelli – contact us any time
- Kelli: tkgunn@gmail.com / (352) 224-0223



- **Materials that we have provided to you**
 - Fundraising Guide
 - Sample letter
 - Conference Sponsorship Sheet
 - These PowerPoint slides

11