Consumer Involvement in Advocacy Organizations

Vol. IV: Teaching Advocacy Skills

Fabricio Balcazar, Tom Seekins, and Stephen B. Fawcett
The Research and Training Center on Independent Living
The University of Kansas
CONSUMER INVOLVEMENT IN ADVOCACY ORGANIZATIONS:
REHABILITATING COMMUNITIES FOR INDEPENDENT LIVING

Volume IV: Teaching Advocacy Skills

Fabricio E. Balcazar, Tom Seekins, Stephen B. Fawcett

Research and Training Center on Independent Living
University of Kansas

Funds for this publication were provided, in part, by a grant to the Research and Training Center on Independent Living at the University of Kansas from the National Institute of Handicapped Research, grant G008006928.
Acknowledgments

We are indebted to the members of Independence in Action of Lawrence, Kansas. We wish to extend particular thanks to Barbara Lumley, Lloyd Slocum, Kalen Beaumont, Celia Tebe, Wendy Balfour, Barbara Moody, and Lois Jones. We also want to express our thanks to Mona McCoy for her help and cooperation.

Staff of the Research and Training Center on Independent Living helped shape and judge the quality of these procedures. We are particularly indebted to Jim Budde, Director of the RTC/IL.

Finally, we owe appreciation to the community of Lawrence, Kansas, which has provided many opportunities and lessons over the years.
Preface

Volumes I, II, and III of this series, Consumer Involvement in Advocacy Organizations: Rehabilitating Communities for Independent Living, present instructional materials to teach consumer advocacy skills. Individuals can study these materials themselves, but our experience suggests that the skills are best learned with the help of a proctor or teacher. This manual, Volume IV, has been developed to show how to use the instructional materials to teach advocacy skills to new group members.

Of course, you need to be familiar with the materials you will use to teach advocacy skills. But you need not be an "expert." This manual is designed to be used by anyone who has read and completed the exercises in Volume I, II, and III.

Your role as teacher is an important one. Your students must keep their performance up to the level described in the manual. However, you must also be flexible in adapting the materials to your particular
group. When problems arise, work through them with other members to reach the best solution. Look at every problem as an opportunity to experiment. In this way, you will grow along with your students, and everyone will share in the pleasure of learning.
Table of Contents

Acknowledgments ..................................... i
Preface ............................................... ii
Table of Contents .................................... iv
Introduction ......................................... 1
Acting as a Teacher: What Do You Do? ........... 2

Part I

Teaching How to Identify and Report Issues ........ 6
Training Session 1 ................................... 9
Training Session 2 .................................. 14
Training Session 3 .................................. 19
Training Session 4 .................................. 27
Consumer's Satisfaction Questionnaire ............ 31

Part II

Teaching the Chairperson How to Conduct Effective Meetings ............ 32
Teacher Responsibilities ............................ 34
Training Session 1 .................................. 37
Training Session 2 .................................. 44
Training Session 3 .................................. 50
Training Session 4 .................................. 56
Role-Play Checklist ................................. 58
Part III

Training the Secretary of the Group ........... 60
Training Session 1 ......................... 61
Introduction

Members come to consumer advocacy and advisory groups with different backgrounds and experiences. Some will have a strong background in organizations, while others will not. Regardless of the range of sophistication, it is important that all members share a basic understanding of their roles and responsibilities.

This manual has been developed to help you conduct training sessions with members of consumer advocacy or advisory groups. It will show you how to use Volumes I, II, and III of this series to teach new members how to monitor events and report issues, chair meetings, take minutes of meetings, and manage group records.

Your responsibility is to help new members learn the important skills they will need to become effective members. Not everything members need to know or learn is contained in these volumes. Rather, these volumes present the basic information everyone needs to participate effectively in a consumer group.

You are the teacher in the learning process. By teaching new members these skills, you will sustain the group. By teaching, you will also learn.
Acting as a Teacher: What Do You Do?

There are several tasks you will repeat throughout the sessions you will conduct. Many of these are listed below.

1. **Prepare additional materials for students to use to practice newly acquired skills.** These materials are newspapers, newsletters, copies of the minutes from the board of directors of your agency, or notes from issues that you have identified as a result of your own personal experience.

2. **Question trainees about the content of the materials studied.** Use the exercises that appear at the end of each lesson in Volume I as probes. Additional questions are suggested here for lessons 5 to 8.

3. **Evaluate trainees' performance.** In order to evaluate trainees' performance, you can use the checklists that are included at the end of each lesson. These are subjective evaluations in which you review students' learning. When a trainee does not do well, you can help him or her to practice weak areas.

4. **Encourage participants by praising their efforts.** You should let your students know that you like what they are doing. When someone makes progress,
you should let him or her know that you are aware of it. Everyone likes to hear he or she is doing a good job.

If you have any questions or would like assistance, feel free to call us at (913) 864-4950. We'd also like to hear about new ways you've found to use these materials.

**A General Lesson Plan**

As a teacher, you will be expected to help others learn how to monitor events and report issues, how to lead effective meetings, how to take accurate minutes and manage group records, and how to plan effective projects. To do this, you will need lesson plans and teaching procedures. The general lesson plan for teaching all of these skills is presented in Table 1 below. The sections that follow provide detailed procedures for teaching these skills.
### Table 1
General Lesson Plan

#### Teaching Issue Identification

<table>
<thead>
<tr>
<th>Session</th>
<th>Materials</th>
<th>What Students Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Volume I: Introduction, Lessons 1, 2, and 3.</td>
<td>Discuss the purpose and methods of consumer involvement and the history of the group.</td>
</tr>
<tr>
<td>2</td>
<td>Lessons 4 and 5.</td>
<td>Select issues from several sources.</td>
</tr>
<tr>
<td>3</td>
<td>Lessons 6, 7, and Volume III.</td>
<td>Develop clear goals for issues they select.</td>
</tr>
<tr>
<td>4</td>
<td>Lesson 8 and Volume III.</td>
<td>Develop a complete issue report.</td>
</tr>
</tbody>
</table>

#### Teaching How to Lead Meetings

<table>
<thead>
<tr>
<th>Session</th>
<th>Materials</th>
<th>What Students Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Volume II, Lessons 1, 2, and 3.</td>
<td>Discuss the purpose and methods of consumer involvement and the beginning of group discussions.</td>
</tr>
<tr>
<td>2</td>
<td>Lessons 4, 5, and 6.</td>
<td>Review methods for planning projects, handling votes, and closing meetings.</td>
</tr>
<tr>
<td>3</td>
<td>Lessons 1 to 6</td>
<td>Practice leadership skills in role-play sessions.</td>
</tr>
<tr>
<td>4</td>
<td>Lessons 1 to 6</td>
<td>Practice leadership skills in role-play sessions.</td>
</tr>
<tr>
<td>Session</td>
<td>Materials</td>
<td>What Students Do:</td>
</tr>
<tr>
<td>---------</td>
<td>-------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>1</td>
<td>Volume II lesson 7.</td>
<td>Practice recording meeting minutes and procedures for managing group records.</td>
</tr>
</tbody>
</table>
Part I

Teaching How to Identify and Report Issues

Both the group proctor and the new members being trained have several responsibilities during the learning process. Table 2 shows what you should do as teacher and what members should do as students.

Study the content of the issue identification and reporting manual (Volume I) as well as the Project Planning Guide (Volume III). Since you will be teaching the content of these lessons to others, you should be familiar with them, too.

This training has been designed to be used over four sessions. We think that teaching the contents of this manual in small groups of three or four persons is most effective. You should arrange a convenient time and place to hold meetings with the new members. Before scheduling the first training session, make sure all participants have the training materials, and ask them to read the introduction of Volume I, as well as Lessons 1, 2, and 3 for the first session.
### Table 2

**Teaching and Learning Activities**

Before training begins, pass out materials, schedule the place and time for sessions, and assign Lessons 1, 2, and 3.

<table>
<thead>
<tr>
<th>SESSION</th>
<th>TEACHER</th>
<th>PARTICIPANTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Pass out materials; discuss teaching steps; set a schedule for meetings; assign lessons 4 and 5 for the next session. Discuss the structure of the group and its history.</td>
<td>Read introduction and etiquette of consumer involvement. Complete the exercises for Lessons 1, 2, and 3.</td>
</tr>
<tr>
<td>2</td>
<td>Review materials and exercises. Next, assign Lessons 6, 7, and Volume III. Schedule next meeting.</td>
<td>Read about Lessons 4 and 5. Complete the exercises. meeting.</td>
</tr>
<tr>
<td>3</td>
<td>Review materials and exercises. Clarify questions; bring additional materials, practice, praise, and discuss issues. Assign lesson 8. Schedule next meeting.</td>
<td>Read Lessons 6 and 7; complete exercises. Read Volume III.</td>
</tr>
<tr>
<td>SESSION</td>
<td>TEACHER</td>
<td></td>
</tr>
<tr>
<td>---------</td>
<td>---------</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Review materials, and exercises; clarify questions; bring additional materials, practice, praise, and discuss issues. Encourage your students to form issue-monitoring teams; offer your continued support.</td>
<td>Read Lesson 8, and prepare a report about an issue they select. Use their new skills.</td>
</tr>
</tbody>
</table>

After all the lessons in Volume I have been completed, it is a good idea to continue your interaction with the participants. Encourage them to use the skills you have taught them. You might even promote the use of a "buddy system." This involves participants calling each other and talking about issues they may want to report. In any case, encourage them to call each other and discuss the issues with the group leader.
Session 1

The first session is intended to cover Part I of Volume I, An Introduction to Consumer Involvement. By the end of this session, the members will have discussed the purpose and general methods of consumer involvement and the history of your group.

Since most members who start this training will be new to the group, it is a good idea to review the purpose of the organization with all participants. If new members have attended at least one meeting, you can describe what happened in that meeting to help them understand the process. Explain the group structure, what type of decisions are made by the group, who makes those decisions, and how members are organized to take action. You should also provide a brief summary of the history of the group, including stories of successful projects.

Next, review Lessons 1, 2, and 3. To review Lesson 1, ask members to look at Table 1 in the manual (A Typology of Consumer Involvement, p. 9), as well as Table 2 (Consumer Involvement Process, p 13). To review Lesson 2, ask members to look at Table 3 (Organizational Standards for Consumer Advocacy Organizations, p. 17), and read the subtitles for the
section on Legal Considerations (e.g., association, corporation, nonprofit status). To review Lesson 3, you just have to read the subtitles (e.g. accentuate the positive, take the high ground, etc.). Ask if anyone had any problems understanding the ideas presented. If anyone had trouble with a topic, discuss it openly. Others may have the same problem.

After briefly discussing a problem, if there still seems to be confusion, read the appropriate sections aloud. Use the written materials to help clarify ideas. Ask other members to help you explain what they understood from the lessons.

Lesson 1

In reviewing Lesson 1, ask members for their personal opinions about consumer involvement. Discuss the various levels of consumer involvement that are described in the manual in Table 1 (p. 9). Ask members if they agree with the list of benefits of organized consumer involvement (p. 10). Review their written answers to the exercises for Lesson 1 (p. 14).

When you are satisfied that members have a working understanding of consumer involvement, move on to Lesson 2.
Lesson 2

Read the list of organizational standards for advocacy groups (Lesson 2, p. 17). Ask if there are any questions. Conduct a brief diagnosis of your organization by asking members to share their answers to the exercise in Lesson 2 (pages 28 and 29). If any of the members have questions regarding any of the items, read the explanations provided in pages 17 to 24. Some participants may want to share the results of your diagnosis with other group members at the organization's next meeting. This could spark a healthy discussion among all members.

Lesson 3

Prompt members to discuss each of the advocacy guidelines presented in Lesson 3 (Etiquette of Consumer Involvement). Ask members to discuss the implications of guidelines for the group. Once you finish this discussion, review students' written answers to the exercises. If any questions are unanswered, ask how they would complete them now.

Finally, give the assignments for the next study session to all participants. Members should come to the next session with the material read and the exercises completed.
After the session, keep a record of your assessment of members' progress in the training. Fill out the checklist presented on the next page. You may want to provide additional individualized training to members who seem to have difficulty with the material. If you think that two or more members seem to be "lost" after the session, you may want to repeat the session and go more slowly with them. Reading aloud difficult sections and discussing their content often helps clarify the material.
CHECKLIST

Note: Make a checkmark to each YES answer for each participant

<table>
<thead>
<tr>
<th>PARTICIPANTS</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Does the participant know the benefits of organized consumer involvement?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Does the participant know the difference between individual and organized consumer involvement?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Does the participant know the functions of a member of an advocacy group?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Does the participant understand the goals of your group?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Does the participant knows the organizational standards for advocacy groups?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Session 2

This session covers the introduction to Part II, and Lessons 4 and 5 of the manual. By the end of this session, students should be able to select issues from several sources. The following is a description of the procedures that you may follow to review this material with participants.

Part II: INTRODUCTION

Review the definition of ISSUES (p. 38). Ask members to define issues and provide some examples. You can ask group members to discuss how their examples meet issue criteria. Ask participants to distinguish between issues, announcements, and general information items. Remember that advocacy groups are more likely to succeed if they start their advocacy efforts focusing on local issues. This do not preclude that groups engage in state and national issues, but group members are more likely to be rewarded by solving their immediate problems. Finally, ask members to read their answers to the exercises for this section (p. 41).

Lesson 4

This lesson reviews several information sources where members can find issues.

1. Review Lesson 4 by reading the subtitles (e.g.,
listen to comment from others, consider your own experience, scanning the newspapers, etc.), and ask if anyone had any difficulties. If anyone did, read aloud the section as a group and discuss it. Ask other members to help you explain their understanding of what information sources might be useful.

2. Ask members to give examples of issues that they may have found in the information sources reviewed.

3. Review students' written answers to the exercises in Lesson 4 (p. 50). If any questions are unanswered, ask members how they would answer them now.

Lesson 5

This lesson covers eight types of issues. Review each issue type, and discuss the examples provided in the materials.

1. Review this lesson by reading the subtitles (e.g., watch for changes in services or practice, watch for changes in policy, watch for changes in budget allocations, etc.), and ask if anyone had difficulty with any issue type. If anyone did, read aloud that section and discuss it as a group.

2. Ask members to give examples of each issue type. For instance, you can ask members to:
a. Give an example of an issue that involves changes.

**Sample answer.** Any increase or decrease in a program's budget or allocation by funding sources in the community.

b. Give an example of an issue that involves positive changes in services or practices.

**Sample answer.** Increase in lift-van transportation hours; new automatic door at the county courthouse; etc.

c. What is an unmet need?

**Sample answer.** A long waiting list for accessible housing.

3. Review the written answers to the exercises in Lesson 5 (P. 63). If any questions are unanswered, ask members how they would answer them now.

4. Introduce more exercises. In order to practice this important skill, bring additional materials. These may include newspapers, minutes from a service organization's board of directors' meetings, newsletters, or publicly available reports. Another possibility is to make a list of some issues that the group has addressed in the past. Give the materials to members for practice. Give them 10 to 15 minutes to
look for issues in the materials. Then discuss what they find as a group. If they miss issues you have found, discuss them. Encourage your students to state the source and the issue type for each item. If they find new issues that you have not seen, let them know.

5. Help members differentiate items that are issues from other items. Participants may identify items as issues that are better viewed as announcements, brief reports, or general discussion topics. When this happens, discuss the item with the members, and come to an understanding of whether the item should be presented as an issue for planning or as an announcement or report.

6. Finally, make the assignments for the next study session. They should come to the next session having read Lessons 6 and 7, and completed the exercises.

After the session, you should keep a record of your subjective evaluation of members' understanding of the content of this lesson. Fill out the checklist presented on the next page. You may want to provide additional training to members who seems to have trouble with the material. If you think that two or more members seem to be "lost" after the session, you
may want to repeat the session or go more slowly.
Reading aloud those sections as a group often helps
everyone learn the key ideas.

CHECKLIST

Note: Make a checkmark to each YES answer for each participant

<table>
<thead>
<tr>
<th>PARTICIPANTS</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
</table>

1. Does the participant seem to understand the difference between issues, announcements, and general discussion items? ___ ___ ___ __

2. Did the participant provide at least one example of an issue type during the group discussion? ___ ___ ___ __

3. Can the participant describe three sources of information? ___ ___ ___ __

4. Does the participant recognize the differences among the various issue types? ___ ___ ___ __

5. Does the participant identify the majority of issues in the materials reviewed? ___ ___ ___ __

6. Did the trainee complete the exercises for this lesson? ___ ___ ___ __
Session 3

This training session covers Lessons 6 and 7 in the manual. By the end of this session, students should be able to develop clear goals for issues they selected. The following is a description of the procedures you could follow to review these lessons.

Lesson 6

This lesson teaches participants how to select relevant issues to report to the group. Five factors that can make an issue relevant are discussed.

1. Read the subtitles (e.g., look for issues of personal interest; look for issues that affect other consumers, etc.), and ask if anyone had trouble understanding the factors that make issues relevant. If anyone did, read the section aloud and discuss it.

2. Ask questions about the content of the lesson.

You may use some of the following questions:

a. What makes an issue relevant?

Sample answer. A judgment about the importance of what has been done, the acceptability of how is it done, the significance of the results, and how the consequences for your group compare to the consequences for others.
b. Give an example of an issue that is the result of your personal experience.

**Sample answer.** A member might report that he was denied health insurance because he has MS.

c. Give an example of an issue that may affect similar other groups located in the area.

**Sample answer.** A change in Medicaid eligibility for home health care services.

d. Give an example of an issue that is similar to one addressed in the past.

**Sample answer.** You should offer an example of an issue the organization might already have addressed, such as handicapped parking.

3. Review students' written answers to the exercises in Lesson 6 (p. 77). If any questions are not completed, ask participants to discuss how they would answer them now.

4. Discuss the relevance of some of the issues in the materials that you prepared for this session. Ask each participant to tell why they feel the issue is relevant to the group, based in the content of this lesson.
Lesson 7

In this lesson, you will find a copy of the tables that display the relationship between issue types, goals, and actions.

1. Review the content of the lesson to make sure every member understands. Ask questions about the content of the lesson. Some questions are:

   a. How do you use the Issue/Goal Chart?

      **Sample answers.** To suggest a course of action, first identify the type of issue you are presenting and goals related to it.

   b. How do you use the Goal/Action Chart?

      **Sample answers.** Once you have identified the goal of the issue in the Issue/Goal Chart, the Goal/Action Chart list several possible actions to follow. These actions are listed in order of complexity.

   c. How do you suggest a course of action?

      **Sample answers.** Once you select one or more actions, review them in the Project Planning Guide (PPG - Volume III). The PPG describes each action in detail. To use the PPG, look in the table of contents of Volume III for the page number of the action you selected. Read the
description of the resources required, objectives, benefits, and costs of the action. This will give you a better understanding of the action. After reviewing the PPG, you will be in a position to justify the action you propose. Or, you may decide to change your recommendation and look for a different action.

d. How do you balance the costs and benefits of a particular action?

Sample answers. The PPG suggests considerations regarding the costs and benefits of each action. Every member recommending an action to the group should first consider the resources available for taking that action, its cost in terms of time and effort employed, as well as possible negative consequences. Then they should compare this information with the potential gains and benefits of achieving their goal. The balance between costs and benefits is a judgment that should be made by group consensus.

2. If any member seems to have trouble following this important lesson, consider reading the lesson out aloud to the group.
ISSUE/GOAL CHART

Situation/Issue Types

Positive service, policy or budget change; and potentially beneficial proposals.

Rumors, complex issues, incomplete or confusing information.

Unmet needs.

Unresponsiveness, offensive language or action, or discrimination.

Negative service, policy, or budget change; and potentially harmful proposals.

General Goals

Support, encourage, increase, maintain, facilitate, honor.

Investigate, study document, clarify.

Create or develop new options, programs, or services; improve.

Oppose, stop, decrease, eliminate, reverse.

Avoid or prevent negative conditions.

Oppose, stop, decrease, eliminate, reverse.
<table>
<thead>
<tr>
<th>GOAL/ACTION CHART</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUPPORT, ENCOURAGE, INCREASE, MAINTAIN, FACILITATE, HONOR.</strong></td>
</tr>
<tr>
<td>#2 Personally compliment favorable action.</td>
</tr>
<tr>
<td>#7 Provide public support.</td>
</tr>
<tr>
<td>#8 Arrange a celebration.</td>
</tr>
<tr>
<td>#14 Remind those responsible.</td>
</tr>
<tr>
<td>#21 Offer public education.</td>
</tr>
<tr>
<td>#23 Volunteer to help.</td>
</tr>
<tr>
<td>#26 Conduct a petition drive.</td>
</tr>
<tr>
<td>#27 Conduct a letter-writing campaign.</td>
</tr>
<tr>
<td><strong>CREATE OR DEVELOP NEW OPTIONS, PROGRAMS OR SERVICES; IMPROVE.</strong></td>
</tr>
<tr>
<td>#2 Compliment favorable action.</td>
</tr>
<tr>
<td>#3 Document evidence of a complaint.</td>
</tr>
<tr>
<td>#5 Establish formal communication mechanism.</td>
</tr>
<tr>
<td>#11 Request participation in planning.</td>
</tr>
<tr>
<td>#12 Watchdog decision process.</td>
</tr>
<tr>
<td>#16 Seek a mediator/negotiator.</td>
</tr>
<tr>
<td>#19 Conduct a study.</td>
</tr>
<tr>
<td>#20 Develop a proposal.</td>
</tr>
<tr>
<td>#21 Offer public education.</td>
</tr>
<tr>
<td>#23 Volunteer to help.</td>
</tr>
<tr>
<td>#24 Build a coalition.</td>
</tr>
<tr>
<td>#25 Develop consensus between groups.</td>
</tr>
<tr>
<td>#26 Conduct a petition drive.</td>
</tr>
<tr>
<td>#27 Conduct a letter writing campaign.</td>
</tr>
<tr>
<td>#28 Seek enforcement of existing laws, policies, or regulations.</td>
</tr>
<tr>
<td>#29 Seek enactment of new laws, policies, or regulations.</td>
</tr>
<tr>
<td>#31 Establish an alternative system.</td>
</tr>
<tr>
<td><strong>STUDY, DOCUMENT, INVESTIGATE, CLARIFY.</strong></td>
</tr>
<tr>
<td>#3 Document evidence of a complaint.</td>
</tr>
<tr>
<td>#5 Establish a formal communication mechanism.</td>
</tr>
<tr>
<td>#6 Request justifications.</td>
</tr>
<tr>
<td>#10 Gather more information.</td>
</tr>
<tr>
<td>#12 Watchdog decision process.</td>
</tr>
<tr>
<td>#19 Conduct a study.</td>
</tr>
<tr>
<td>#20 Develop a proposal.</td>
</tr>
<tr>
<td>#23 Volunteer to help others.</td>
</tr>
<tr>
<td>#24 Build a coalition.</td>
</tr>
<tr>
<td>#25 Develop a consensus between groups.</td>
</tr>
<tr>
<td><strong>AVOID OR PREVENT NEGATIVE CONDITIONS.</strong></td>
</tr>
<tr>
<td>#1 Postpone action.</td>
</tr>
<tr>
<td>#4 Personally criticize unfavorable action.</td>
</tr>
<tr>
<td>#6 Request formal justification.</td>
</tr>
<tr>
<td>#11 Request participation.</td>
</tr>
<tr>
<td>#12 Watchdog decision process.</td>
</tr>
<tr>
<td>#13 Provide corrective feedback.</td>
</tr>
<tr>
<td>#14 Remind those responsible.</td>
</tr>
<tr>
<td>#15 Make an informal complaint.</td>
</tr>
<tr>
<td>#16 Seek a mediator/negotiator.</td>
</tr>
<tr>
<td>#21 Offer public education.</td>
</tr>
<tr>
<td>#22 Conduct service audits.</td>
</tr>
<tr>
<td>#24 Build a coalition.</td>
</tr>
<tr>
<td>#25 Develop a consensus between groups.</td>
</tr>
<tr>
<td>#28 Seek enforcement of existing laws, policies, regulations, and ordinances.</td>
</tr>
<tr>
<td><strong>OPPOSE, STOP, DECREASE, ELIMINATE, REVERSE.</strong></td>
</tr>
<tr>
<td>#4 Personally criticize unfavorable action.</td>
</tr>
<tr>
<td>#6 Request formal justification.</td>
</tr>
<tr>
<td>#9 Express opposition publicly.</td>
</tr>
<tr>
<td>#13 Provide corrective feedback.</td>
</tr>
<tr>
<td>#15 Make an informal complaint.</td>
</tr>
<tr>
<td>#16 Seek a mediator/negotiator.</td>
</tr>
<tr>
<td>#17 File a formal complaint.</td>
</tr>
<tr>
<td>#18 Initiate legal action.</td>
</tr>
<tr>
<td>#22 Conduct service audits.</td>
</tr>
<tr>
<td>#24 Build a coalition.</td>
</tr>
<tr>
<td>#26 Conduct a petition drive.</td>
</tr>
<tr>
<td>#27 Conduct a letter-writing campaign.</td>
</tr>
<tr>
<td>#28 Seek enforcement of existing laws and policies.</td>
</tr>
<tr>
<td>#30 Flood the system.</td>
</tr>
<tr>
<td>#32 Organize passive resistance.</td>
</tr>
<tr>
<td>#33 Organize public demonstration.</td>
</tr>
<tr>
<td>#34 Media expose'.</td>
</tr>
<tr>
<td>#35 Organize a boycott.</td>
</tr>
</tbody>
</table>
3. Review students' written answers to the exercises in Lesson 7 (p. 87). If any questions are unanswered, ask members to discuss how they would answer them now.

4. You can use some of the issues already discussed in previous sessions to practice developing clear goal statements and action plans. The purpose of this exercise is to teach participants how to use the PPG. Once the issue type and goal have been identified, participants should look at the various actions listed for each goal. Encourage participants to review the actions, and discuss the potential costs and benefits of each.

5. Finally, you should make the assignment for the next session, Lesson 8. For the last session, each participant should bring an issue report to the meeting.

6. Use the checklist to evaluate participant's understanding of the content of this session.
CHECKLIST

Note: Make a checkmark to each YES answer for each participant

<table>
<thead>
<tr>
<th>PARTICIPANTS</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Does the trainee state the criteria for judging the relevance of issues for those issues that he or she identified?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Does the trainee have difficulty identifying issue types for the situations presented?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Does the trainee use the Issue/Goal chart to select goals for identified issues?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Does the trainee use the Goal/Action chart to select actions to achieve the goal?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Does the trainee use the PPG to analyze objectives, resources required, cost, and potential benefits of actions?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Session 4

This training session covers Lesson 8 in Volume I. By the end of this session, students should have developed a complete issue report. The following is a description of the procedures to follow to review this lesson with trainees.

Lesson 8

1. Read the subtitles (e.g., state the issue and the source, describe the situation, explain what makes this issue relevant to the group, etc.), and ask if anyone had difficulty preparing an issue report. Ask the trainees questions about the content of the lesson. You can use some of the following questions:

   a. What do you need to say to state the issue and the source?

      **Sample answer.** The participant has to describe the problem as she understands it, and specify the source of the information.

   b. How do you determine the issue type?

      **Sample answer.** Look in Lesson 4, review the list of issue types (p. 62), and identify which one corresponds to the particular situation.
c. How do you select the goal?

**Sample answer.** Once they have identified the issue type, they can look at the Issue/Goal chart to identify the goal. They should select the goal they feel is most appropriate for the specific situation.

d. What is a statement about the values involved in the issue reported?

**Sample answer.** This is a statement about how the issue is related to such principles as fairness, equal access, equal opportunity, independence, social acceptance, safety, or dignity.

2. If some member indicates having difficulty, you should read aloud that section and discuss any problem.

3. Review the written answers to the exercises in Lesson 8 (p. 97). If some questions were not completed, ask members to discuss how they would answer them now.

4. If any student brought an issue report, you should praise them and review their report with all members. After this, provide each member with materials (e.g. newsletters, newspapers) to select an issue and prepare a report. Ask them to use the PPG and the
training manual to consult if they have any question. The purpose of the exercise is for participants to practice preparing an issue report. Ask each participant to read to the group the issue type and goal they have identified. Then participants should look at the various actions listed for each goal in the PPG. When all necessary information has been collected, participants could write down their reports to be read to the group.

5. Before finishing the session, thank all members for their participation. EXPLORE WAYS TO HELP PARTICIPANTS PREPARE ISSUE REPORTS, AND KEEP UP TO DATE WITH ISSUES IN THEIR COMMUNITY. Encourage members to report an issue whenever they find one. You can also ask members to discuss the issues they have identified with the chairperson prior to group meetings.

Consider calling participants occasionally and asking them about issues they have seen. This gives you an added chance to ask if they need any help in presenting their reports to the group.

6. Finally, ask participants for ideas and suggestions to improve the training methods and materials. Use the questionnaire at the end of Part I of this manual to evaluate participants' satisfaction with the training.
NOTE: IF YOU HAVE ANY QUESTION, PLEASE CALL US.
WE WILL BE GLAD TO HELP YOU (913) 864-4950.

7. Use the checklist on this page to evaluate participant's understanding of the content of this lesson.

CHECKLIST

Note: Make a checkmark to each YES answer for each participant.

<table>
<thead>
<tr>
<th>PARTICIPANTS</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Did the participant make an issue report?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Was the report complete?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Do you think that the participant has understood the process of finding issues and reporting them to the group?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NOTE: If you think that a participant needs additional training, make arrangements for another meeting, and offer additional help.
Selecting and Reporting Issues Satisfaction Questionnaire

Please answer the following questions:

1. Overall, how satisfied are you with the training procedures developed to train consumers to identify and report issues to consumer advocacy groups?

   Very Dissatisfied 1 2 3 4 5 6 7 Very Satisfied

2. How satisfied are you with the content of the training manual that you read?

   Very Dissatisfied 1 2 3 4 5 6 7 Very Satisfied

3. How satisfied are you with the practice and exercises conducted?

   Very Dissatisfied 1 2 3 4 5 6 7 Very Satisfied

4. How important do you think it is to train members of advocacy groups with this procedures?

   Not Important 1 2 3 4 5 6 7 Very Important
Part II

Teaching the Chairperson How to Conduct Effective Meetings

Groups generally select their most skilled members to chair group committee meetings. But with a little help and practice, this opportunity can be available to most members. This section shows how to use the instructional materials in Volume II, Leading Effective Meetings, to help members learn how to chair meetings.

The process of training a chairperson is similar to the process of teaching individual group members how to identify and report issues. The chairperson reads the instructional materials in Volume II and completes the exercises. You meet with the chairperson to review the materials and help him or her practice. The emphasis of the chairperson's learning activities is practice.

The chairperson should have completed Volume I and III of this series before beginning chairperson training. An important part of performance is to deal with issues that are reported by members during meetings. For this reason, it is essential that the
The chairperson teaching process is designed to be conducted in four sessions. Arrange a convenient time and place for sessions with the chairperson. In the last two sessions, you will need to invite other group members to help the chairperson practice new skills. Table 2 summarizes the activities for this training process.

**Table 2**

<table>
<thead>
<tr>
<th>Session</th>
<th>Teacher</th>
<th>Chairperson</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Read Part I of the manual and Lessons 1, 2, and 3.</td>
<td>Read Part I of the manual, and Lessons 1, 2, and 3. Complete the exercises.</td>
</tr>
<tr>
<td>2</td>
<td>Read Lessons 4, 5, and 6. Review the exercises. Discuss the procedures, and ask for an overview of the whole process.</td>
<td>Read Lessons 4, 5, and 6. Complete the exercises. Discuss the procedures; provide an overview of the whole process.</td>
</tr>
<tr>
<td>3</td>
<td>Prepare role-play practice exercises. Ask two more persons to join you for the role-play practice.</td>
<td>Practice the skills in Lessons 1 to 6.</td>
</tr>
<tr>
<td>4</td>
<td>Prepare role-play practice exercises. Ask one or two more persons to attend the training session.</td>
<td>Practice the skills in Lessons 1 to 6. Then practice all of the skills again.</td>
</tr>
</tbody>
</table>
Teacher Responsibilities

1. **Question the chairperson about the content of the material covered.** Use the exercises that appear in each lesson in the manual as probes.

2. **Provide feedback to the chairperson.** Follow the chairperson's performances during practices closely and let him or her know exactly which steps were included or missed.

3. **Help the chairperson remember steps.** You will find summaries of the steps of meeting procedures for each lesson, including the steps involved in chairperson performance during group meetings: preparing the agenda, opening the meeting, beginning the discussion of issues and business, handling votes, systematically planning actions, and closing the meeting. Use these summaries to help follow the chairperson's performance and to prompt missed steps.

4. **Prepare issues and other agenda items for role-playing practices.** You will find 4 scripts for the role-play practice in this manual. It may be necessary to prepare additional issues to be discussed during practice sessions. You may also have to prepare announcements and other reports for practice. You
should write these examples before the training session, so they can be read easily by participants during role-play exercises.

5. Invite one or two members of the group to participate in the practice exercises. You will have to explain to them the purpose of the meeting, and assign them specific roles to be performed. They will have to read the announcements or issues during the "mock" meetings.

6. Praise the chairperson for his or her effort and progress. The chairperson's performance is complex and sometimes difficult. Being a good chairperson requires practice, and you should praise the chairperson for progress made during training.

7. Tape the last training session and some of the "real" group meetings. The purpose of having a tape recording of the meetings is so that the chairperson can listen to the tapes and get feedback on his or her performance. Arrange to listen to the tapes with the chairperson, so you can discuss the performance. You should point out examples of appropriate performance. When you find an omission, discuss with the chairperson ways to deal with similar situations. It is important that you and the chairperson know that the steps
suggested in the training manual can be adapted to the specific circumstances of your group meetings.

Following the steps closely will help the group, but it is not required that all steps be followed exactly.
Session 1

The first two training sessions review the content of the chairperson's training manual. During the first session you have to cover the introduction and Lessons 1, 2, and 3. By the end of this session, the chairperson should be able to prepare a meeting agenda and review procedures for opening a meeting and beginning discussions.

An Overview of Action-Oriented Meetings

This is an introduction to the group meeting process. You should discuss the "rules for good discussion" (p. 4). Ask the chairperson to comment on the proposed rules, and discuss why these rules are important.

Lesson 1

This lesson reviews the steps of preparing the meeting agenda. Review the model of a meeting agenda presented in this lesson.

1. Review the lesson by reading the subtitles (e.g. brief announcements of events or activities, business or issues requiring planning, action, or decision by the group, etc.), and ask if the chairperson has any difficulty with the agenda format proposed. If he or she indicates having any problems
with the format, discuss them in detail. Consider making changes that will improve the meeting process.

2. Review the chairperson's written answers to the exercises in Lesson 1. If some questions are not completed, ask the chairperson how he or she would answer them now.

3. Prepare additional exercises by collecting a list of items that can be included in a meeting agenda. Have the chairperson practice filling out an agenda for the meeting using these items. Use the format of the meeting agenda presented on the next page for this practice. Discuss how the chairperson can collect information to prepare the agenda for the meeting in advance.
MODEL OF A MEETING AGENDA

AGENDA MEETING

Date: __________________________

1. Call to order.

2. Review and approve the minutes from the last meeting.

3. Introduce guests and speakers.
   a.

4. Complete the agenda.

5. Call for brief announcements of events and activities.
   a.
   b.

6. Call for issues and business requiring planning, action, or decision by the group:
   a.
   b.
   c.

7. Call for general information items.
   a.
   b.
   c.

8. Have secretary summarize decisions.

9. Adjourn the meeting.
Lesson 2

This lesson reviews the steps for opening the meeting. Review the steps presented in this lesson.

1. Go through this lesson reading the subtitles (e.g. call the meeting to order, introduce guests and speakers, read and approve the minutes, etc.), and ask if the chairperson had any problems with the steps proposed. If he or she did, discuss them in detail. The sequence and style of this portion of the meeting is flexible. The chairperson should feel free to make changes, so long as all the items are covered.

2. Review the written answers to the exercises in Lesson 2. If any questions are not completed, ask the chairperson how he or she would answer them now.

3. Ask the chairperson to recall the steps for opening the meeting. You can use the summary of the steps presented below to check the completeness of his or her answer.

Lesson 2 Summary

STEPS TO OPEN THE MEETING

1. CALL THE MEETING TO ORDER.

2. INTRODUCE INVITED GUESTS AND SCHEDULED SPEAKERS.

3. REVIEW AND APPROVE THE MINUTES OF THE LAST MEETING.
4. ADD ANY ADDITIONAL NAMES AND ITEMS TO THE AGENDA.

5. CALL FOR BRIEF ANNOUNCEMENTS.

6. CALL ON GUEST SPEAKERS.

7. ANNOUNCE THE DISCUSSION OF BUSINESS AND ISSUES BY SUGGESTING A GENERAL TIME LIMIT FOR ITEMS.

Lesson 3

This lesson reviews the steps for beginning the discussion of issues and business that require planning, action, or decision by the group.

1. Review this lesson by reading the subtitles (e.g. announce an item, clarify missing information, compliment reporters for their efforts, etc.), and ask if the chairperson had any problems with the steps proposed. If the chairperson did, discuss them in detail.

2. Review the chairperson's answers to the exercises in Lesson 3. If some questions are unanswered, ask the chairperson to complete the exercises.

3. Ask the chairperson to recall the steps presented in beginning discussions. Use the summary presented below to check his or her answer.
Lesson 3 Summary

Steps to Begin the Discussion of Issues and Business Requiring Planning, Action, or Decision by the Group

1. Announce an item.
2. Clarify missing information.
3. Compliment reporters for their efforts.
4. Encourage questions and comments from group members.
5. Call on silent members.
6. When discussion slows or becomes repetitious, guide discussion toward a decision by summarizing it.
   a. Table the issue.
   b. Form a committee.
   c. Do systematic planning.
   d. Take a vote.

4. Praise the chairperson for his or her performance. Remember that this is a complex process. It takes time and effort to complete it. Praise the chairperson for his or her performance during this session.

5. Finally, assign Lessons 4 to 6 for the next study session. The chairperson should come to the next
session with the material read and the exercises completed.

After the session, keep a record of your subjective evaluation of the chairperson's progress with the training procedure by completing the checklist. You may want to provide additional training if the chairperson seems to have difficulty with a particular section. If you and the chairperson agree, you may want to repeat this training session and go slowly, perhaps reading aloud those sections that appear more difficult.

CHECKLIST

Note: Make a checkmark to each YES answer for each participant

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Does the chairperson feel comfortable preparing the meeting agenda?

2. Does the chairperson remember all the steps for opening the meeting?

3. Does the chairperson remember the steps to begin the discussion of issues and businesses requiring planning, action, or decision by the group?
Session 2

This training session covers Lessons 4, 5, and 6 of the chairperson training manual. By the end of this session, the participants will have reviewed procedures for planning projects, handling votes, and closing meetings.

Lesson 4

This lesson presents the steps for handling the votes on business and issues requiring group action.

1. Review this lesson by reading the subtitles (e.g., ask for a motion, ask for a second, confirm the motion, etc.), and ask if the chairperson had any difficulty with the steps proposed. If the chairperson did, discuss them in detail.

2. Review the chairperson's written answers to the exercises in Lesson 4. If some questions are not completed, ask the chairperson how he or she would answer them now.

3. Ask the chairperson to recite the steps for handling a vote. Use the summary presented below to check the answer.
Lesson 4 Summary

STEPS FOR HANDLING A VOTE

1. ASK FOR A MOTION.
2. ASK FOR A SECOND.
   If there is no second, ask for another motion.
3. CONFIRM THE MOTION.
4. ASK FOR FINAL COMMENTS.
5. TAKE A VOTE.
6. DECLARE THE RESULTS.
7. CONFIRM THE VOTE.
8. ASSIGN INDIVIDUAL RESPONSIBILITIES.

Lesson 5

This lesson presents the steps for systematic planning of action projects.

1. Review this lesson by reading the subtitles (e.g., declare the start of project planning, clarify the situation, suggest a goal for the group to consider in the situation, etc.), and ask if the chairperson had any difficulty with the steps proposed. If the chairperson did, discuss it in detail.

2. Review the written answers to the exercises in Lesson 5. If any questions were not completed, ask the chairperson how he or she would answer them now.
3. Ask the chairperson to recite the steps in planning actions. Use the summary presented below to check the answer.

Lesson 5 Summary

STEPS FOR ANALYZING ISSUES AND DEVELOPING ACTION PLANS

1. DECLARE THE START OF PROJECT PLANNING.

2. CLARIFY THE SITUATION.

3. SUGGEST A GOAL FOR THE GROUP TO CONSIDER.

4. ASK MEMBERS TO DEVELOP AN ACTION STRATEGY.
   Hint: Use the Project Planning Guide, if appropriate.

5. When no more suggestions are offered,
   SUMMARIZE THE STRATEGY.

6. CHECK THE SUFFICIENCY OF THE STRATEGY.

7. REVIEW RESOURCES REQUIRED BY THE STRATEGY.

8. LEAD A DISCUSSION OF POSSIBLE CONSEQUENCES OF THE STRATEGY.

9. CONSIDER OPTIONS AND ADDITIONS.

10. BRING ANALYSIS AND PLANNING TOWARD A CLOSE.
Lesson 6

This lesson presents the steps for closing the meeting.

1. Review this lesson by reading the subtitles (e.g., bring discussion of business and issues to a close, call for any general discussion items if time permits, etc.), and ask if the chairperson had any difficulty with the steps proposed. If the chairperson did, discuss it in detail.

2. Review the written answers to the exercises in Lesson 6. If any questions were not completed, ask the chairperson how he or she would answer them now.

3. Ask the chairperson to recite the steps for closing the meeting. Use the summary presented below to check the answer.

Lesson 6 Summary

STEPS FOR CLOSING THE MEETING

1. BRING DISCUSSION OF BUSINESS AND ISSUES TO A CLOSE.

2. CALL FOR ANY GENERAL DISCUSSION ITEMS.

3. ASK IF THERE ARE ANY FINAL ITEMS TO DISCUSS.
   - Time permitting, you can go ahead and have a discussion.
- If time is too short, you can table the issues for the next meeting, or form a committee.

4. ASK THE SECRETARY TO SUMMARIZE THE DECISIONS.
5. ADJOURN THE MEETING.
6. THANK MEMBERS.

4. Praise the chairperson for his or her performance. Remember that this is a complex process, and it takes time and effort to complete it. Praise the chairperson for achievements during this training session.

5. Finally, read the assignments for the next study session to the chairperson. He or she should come to the next session with the materials read and prepared for the role-playing practice.

After the session, if you want to keep a record of your subjective evaluation of the chairperson progress, you can fill out the checklist on the next page. You may want to provide additional training, if the chairperson seems to have some difficulty with a section of the materials. If you and the chairperson agree, you may want to repeat this training session and go slowly, perhaps reading aloud those sections that appear more difficult.
CHECKLIST

Note: Make a checkmark to each YES answer for each participant.

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Does the chairperson remember the steps for handling the votes on business and issues requiring group action?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Does the chairperson remember the steps for systematic planning of action projects?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Is the chairperson familiar with the Issue/Goal Chart, the Goal/Action Chart, and the Project Planning Guide (Volume III of this series)?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Does the chairperson remember the steps for closing the meeting?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Session 3

The last two training sessions are designed to provide the chairperson with direct, practical experience using the steps presented in the chairperson training manual. Role-play exercises are used in this training session. The following is a detailed description of the role-play exercises.

Role-Play Practice

Several role-play scripts are presented below. Basic information is provided in these descriptions. You should prepare additional scripts for issues, announcements, or reports to make during the role-play exercises. You should also invite one or two members of the group to help you conduct the role play exercises. They will have to come to the training session. They should also feel free to make up any additional reports.

The purpose of the role-play exercise is to provide practice opportunities for the chairperson. The idea is to have "mock" meetings. The chairperson should behave as if these meetings were real group meetings. The chairperson should follow all the steps to open the meeting, begin the discussion of issues, handle votes, conduct systematic planning, and close the meeting.
To practice, the volunteers select an issue to report. When asked to make their issue report by the chairperson, they could read the scripts. You should ask the chairperson to use the skills described in the training manual to discuss each issue. If the chairperson needs help remembering any step, you can use the summary steps on sessions 1 and 2 of this manual to remind him or her.

The members participating in this exercise should use the role-play checklist included at the end of this lesson to give performance feedback to the chairperson. Once the chairperson has finished acting out the meeting, you can check off all of the tasks he completed. By using the checklist to guide the feedback, the chairperson should be able identify any tasks that require additional practice. We suggest that the practice continue until he or she has role-played the tasks successfully on two consecutive occasions.

Finally, you may want to tape record the role-play practices. Then the chairperson can listen to his or her performance and see what needs to be improved.
Role-Play # 1

You have read in the ILC newsletter that the board has voted to extend lift-van services to weekends from 4 P.M. to midnight Friday and Saturday, and from 10 A.M. to 6 P.M. on Sunday. You should report that this as a change of service that will benefit most consumers. It is an opportunity to compliment the board for its good work. Indicate that you believe the board and staff have been doing an exceptional job over the past year.
Role-Play # 2

You have read in the newspaper that the city's Community Development Program is requesting citizen-based proposals for the use of $210,000 in funds. The money can be used for any purpose. You should report that this is a community budget allocation that provides an opportunity to propose a transportation project. Do not suggest why you think the issue might be relevant to the group or your opinion, unless the chairperson asks you to clarify this missing information.
Role-Play #3

You've heard on the radio that the city council is in the process of deciding whether to build a "Special Population Center" for persons with disabilities. You should say that you think that this is a great opportunity for the group to do something.

NOTE: If the chairperson asks you to Clarify Missing Information, say that it is a proposal that affects every consumer in the area, and this is an effective way of serving many group constituents. Further, the city council and developers ought to ask for your input on issues like this.
Role-Play #4

A friend has told you that his landlord has threatened to evict him if he has any more of his "crippled" friends over to the pool. The landlord says it's giving the place a bad name. You should report this seems to be a hostile act and probably violates your friend's rights. The group needs to remind the community that it is still keenly interested in fair housing issues. Suggest your own opinion about such cases.
Session 4

The last training session is also designed to provide direct practical experience to the chairperson. Role-play exercises are used in this training session. You are required to prepare some role-play scripts. You can also use some of the role-play exercises used in the last training session, Role-Play Practice.

You should also invite one or two members of the group to help you conduct the role-play sessions. They will have to come to the training session. They should also feel free to make up any additional reports.

To practice, the volunteers select issues to report. When asked by the chairperson to make their reports, they can read them. You should ask the chairperson to use the skills described in the training manual to lead discussion of each issue. If the chairperson needs help remembering all the steps, use the summaries of Lessons 1 to 6 on sessions 1 and 2 of this manual to prompt him or her.

The members participating in this exercise should use the role-play checklist included at the end of this lesson to give feedback to the chairperson on his or her performance. Once the chairperson has finished acting out the situation, you can check off all of the
tasks completed. By using the checklist to guide the feedback the chairperson receives, he or she will be sure to identify any tasks that require additional practice. We suggest that the chairperson practice until he or she has role-played the tasks successfully on two consecutive occasions.

Finally, you should tape record this session. Then, the chairperson can listen to the performance and identify what needs to be improved. If possible, you should also tape a group meeting lead by the chairperson. Listening to a tape of a meeting will give the chairperson a pretty good idea of how he or she handles the steps during actual meetings.
### ROLE-PLAY CHECKLIST

**Opening the Meeting and Beginning Discussion**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Call the meeting to order.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Complete the agenda</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Announce discussion of business and issues.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Announce each item (separately).</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Encourage questions and comments from group members.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>Guide discussion toward decision by summarizing it.</td>
<td></td>
</tr>
</tbody>
</table>

**Planning**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Declare the start of project planning.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Suggest a goal for the group to consider.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Ask members to develop an action strategy.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Use the Project Planning Guide.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Review consequences of suggested actions.</td>
<td></td>
</tr>
</tbody>
</table>

**Voting**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Ask for a motion.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Ask for a second.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Take a vote.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Assign individual responsibilities.</td>
<td></td>
</tr>
</tbody>
</table>
Closing the Meeting

1. Bring discussion to a close.
2. Ask secretary to summarize meeting.
3. Adjourn the meeting.

Overall, how would you rate the chairperson's performance?

[ ] Good  [ ] Fair  [ ] Needs more work

Overall, how satisfied were you with the planning and decisions made on the issues discussed?

[ ] Very Satisfied  [ ] Satisfied  [ ] Needs Work
Part III

Training the Secretary of the Group

The process of training the secretary is similar to other sessions for the chairperson but shorter. Again, the emphasis of the learning activities is practice.

You should provide the secretary with a copy of Volume II, Leading Effective Meetings. The secretary should complete Volume I of this series, Monitoring Events and Reporting Issues before beginning training as secretary. It is also important that the secretary review the procedures for chairing meetings in Volume II, so he or she will be familiar with the group meeting process. You can help in this by discussing the process.

This training can be conducted in one session. You should try to arrange a convenient time and place to hold the training session.
Session 1

The secretary is required to read Lesson 7 of Volume II. This lesson reviews the steps in recording the minutes of group meetings and managing group records. By the end of this session, participants will have practiced recording meeting minutes and will have reviewed procedures for managing group records.

1. You can go through this lesson reading the subtitles (e.g. taking minutes, standard format for recording minutes, etc.), and ask if he or she had any trouble with a section of the lesson. If the secretary did, discuss the item in detail.

2. Review the written answers to the exercises in Lesson 1. If some questions are unanswered, ask the secretary to complete the exercises.

3. Prepare additional exercises. You can prepare a list of items that can be included in a group meeting. Read the items to the secretary to practice taking minutes of the meeting.

4. You can invite the secretary to be part of the training group for the chairperson (Session 3 and 4 of Part II). This way, the secretary can practice taking the minutes at the role-play meetings. This will provide additional practice. The participants in the
training group can then give the secretary feedback on the quality of recorded minutes.

5. Give feedback to the secretary on the quality of the minutes. You should praise his or her efforts and progress. Call the secretary and discuss the minutes of the next two or three "real" meetings. This gives you the opportunity to provide performance feedback. Offer additional help if the secretary ask for it. All members of the group will benefit from accurate minutes.