Board Inclusion

Introductory Session
Practices that build inclusive organizations

We'll get started in a moment, but first,

Use chat to answer this question

In what ways do you hope inclusion will help impact your Board and organization?

Training Agenda

☑ **Welcome and Introductions**

☑ **Overview**

☑ **Elements of Inclusive Practices**

☑ **Discussion Question**

☑ **Self-Assessment**

Work Plan and Next Steps

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👉 Community Mental Health Association of Michigan

👉 The Arc of Western Wayne County

👉 Disability Rights, Michigan

👉 The Arc of Macomb County

👉 Community Living Services

👉 The Arc of Oakland County

👉 Oakland Community Health Network (Sub-Committees)

👉 The Arc of Kent County

Training Team

Dr. Mark Friedman

Dr. Ruthie-Marie Beckwith

Co-Hosts

David Taylor

Sarah Carmany

Mary Angus

- ❑ **What does Board Inclusion Mean?**
- ❑ **Why is it important?**
- ❑ **What is Beyond Tokenism?**

Why Are Inclusive Boards Important to Organizations?

Peter Burns, Exec. Dir., the Arc-US

If you are really going to

Why Are Inclusive Boards Important to Organizations?

got Bitty?

I think a lot of times that's where

Betty Williams, former President Self-Advocates Becoming Empowered

True or False?

Individuals with disabilities can serve as the chairperson of a board of directors.

Board meetings are too long and boring for individuals with disabilities to get much out of them.

Only people who can read and write can serve on a Board or Committee.

The voices of individuals with disabilities influence the decisions the board or committee makes.

Mentors tell people what to say and manipulate their opinion.

Color coding materials is childlike and too much work.

Organizations' climate and culture changes when individuals with disabilities are involved in leadership roles.

If someone breaks down and cries at the board meeting, the best thing to do is ignore them.

"He who sells you the token instead of the coin always retains the power to revoke its worth, and to command you to get off the bus before you have reached your destination. Tokenism is a promise to pay. Democracy, in its finest sense, is payment."

Dr. Martin Luther King, Jr. --   Why We Can't Wait, 1963
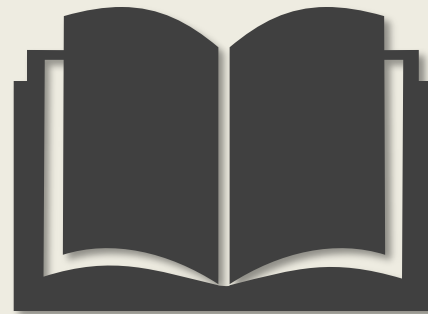
Tokenism

The practice of making only a perfunctory effort to do a particular thing, i.e. by recruiting one to two people from underrepresented groups to give the appearance of inclusion.

Inclusion

Deliberately aiming to involve all types of people

Inclusion

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Issues

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Beyond Tokenism: People With Complex Needs in Leadership Roles: A Review of the Literature 🛒

Ruthie-Marie Beckwith; Mark G. Friedman; James W. Conroy

Abstract ⌄   View Article   📄 PDF

Tokenism From the Eye of the Beholder 🛒

Gail Bottoms; Liz Weintraub; David Taylor

Abstract ⌄   View Article   📄 PDF

People With Complex Needs in Leadership Roles: Results of a National Survey 🛒

Ruthie-Marie Beckwith; Mark G. Friedman; James W. Conroy

Abstract ⌄   View Article   📄 PDF

Effective Strategies for Supporting Individuals With Complex Needs in Leadership Roles

Mark G. Friedman; Ruthie-Marie Beckwith; James W. Conroy
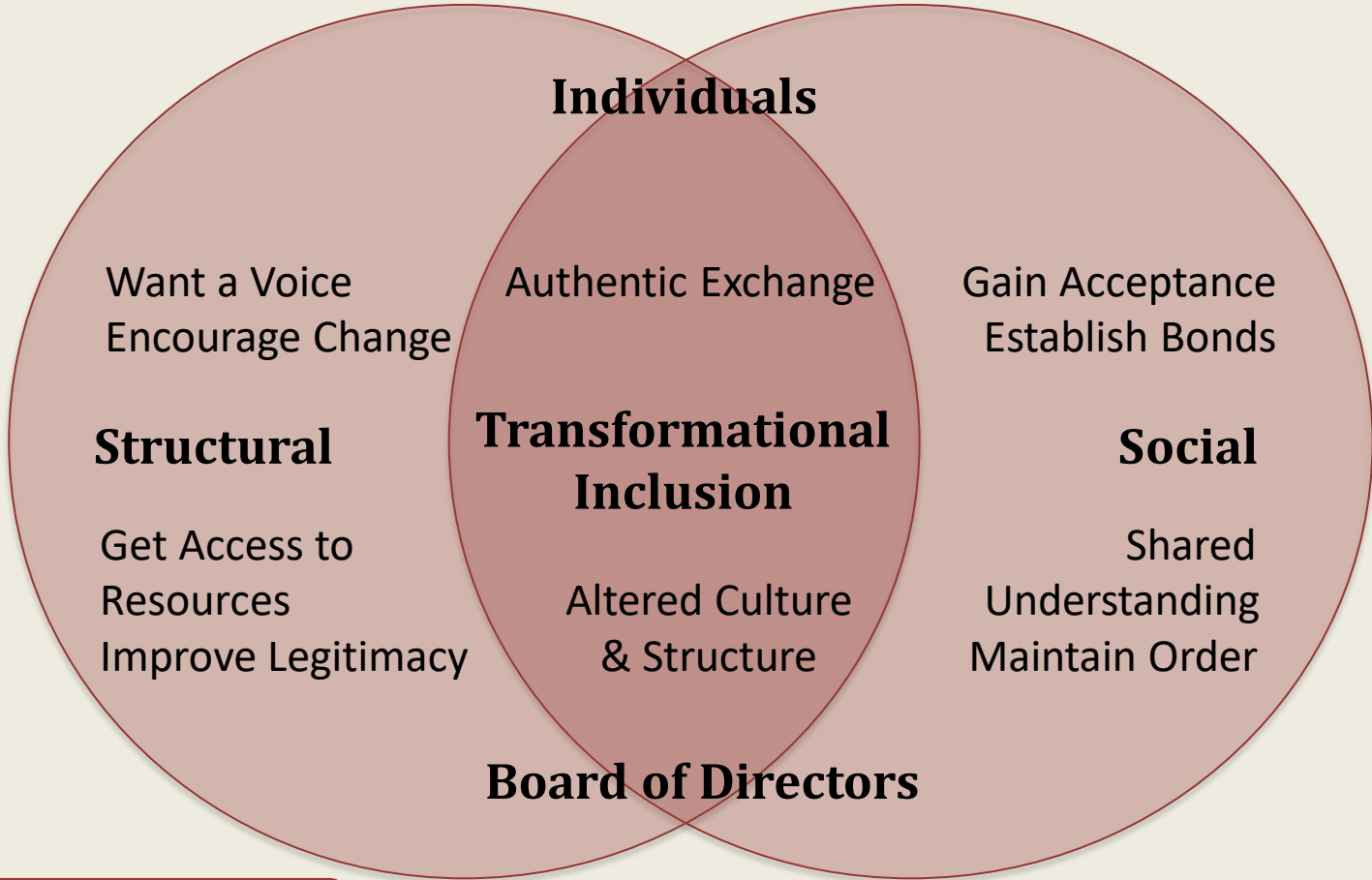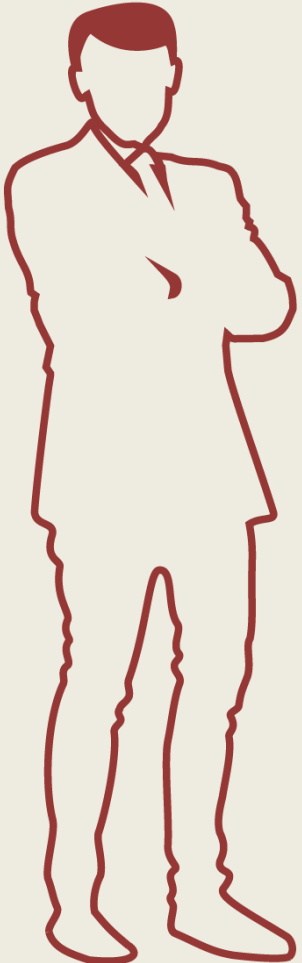
Abstract ⌄   View Article   📄 PDF

Our Research Shows
Inclusive Board Practices Provide:

- ☑ **Authentic Membership**
- ☑ **Deliberate Communication**
- ☑ **Full Participation**
- ☑ **Meaningful Ways to Contribute**
- ☑ **True Influence**
- ☑ **Mentors and Supports**

Inclusive Board Are Transformed

Individuals

Want a Voice
Encourage Change

Authentic Exchange

Gain Acceptance
Establish Bonds

Structural

**Transformational
Inclusion**

Social

Get Access to
Resources
Improve Legitimacy

Altered Culture
& Structure

Shared
Understanding
Maintain Order

Board of Directors

Adapted from original by
Christopher Fredette, 2007

Why is being on a Board important?

Individual Outcomes

"It helped me a lot. How to work with people. How to ask questions. How to feel good about myself."

– Elouise Woods

Self-advocacy and self-determination

Increased self confidence

Expanded interpersonal skill

Creation of social networking opportunities

Expanded leadership roles

Enhanced status within the community

Fill broad range of roles within and outside of the organization

How does it help the organization?

Organizational Outcomes 1

Adoption of person centered practices

People with disabilities are engaged in planning at all levels

Increased emphasis on community inclusion

Increased quality and satisfaction

Decreased use of segregated supports

Change in organization's goals and priorities changed

Organizational Outcomes 2

Change in organizational structure

Increased resources or funding

Expanded influence with policymakers

Expanded views of capabilities of people with disabilities

People with disabilities are hired

People with disabilities are part of quality monitoring and improvement efforts

Transformational Outcomes are changes in the organization's culture where everyone is valued as key to the organization success.

Tia Nelis, former President, Self Advocates Becoming Empowered

Transformational Outcomes are changes in the organization's culture where everyone is valued as key to the organization success.

Nancy Thaler, former Exec. Dir., National Assoc. of State DD Services

Discussion (5 min)

☑ **What is one personal goal you have for serving on the Board?**

Six Elements of Board Inclusion

Six Elements of Board Inclusion

1. **Authentic Membership** – recruitment, full engagement, equality.
2. **Deliberate Communication** – plain language that is understandable.
3. **Full Participation** – in decision making.
4. **Meaningful Ways to Contribute** – roles and responsibilities for people.
5. **True Influence** – making a difference
6. **Mentors and Supports** – Providing needed help to be effective.

1. Authentic Membership:
Individual feels like they are equal members.

1. Authentic Membership:
Individual feels like they are equal members.

| Recruitment is thorough and broad-based | Individual is provided board orientation | Individual attends board meetings, retreats and fellowship opportunities | Board and management are committed to inclusion | Board has a budget for inclusion supports |

2. Deliberate Communication:
Individual can understand information they receive and communicate with the other members

2. Deliberate Communication:
## Individual can understand information they receive and communicate with the other members

Individual is afforded use of technology to prepare and participate in meetings.

Individual's communication style or use of interpreter is factored into board discussions.

Individual is routinely called upon for their input and asked for clarification when needed.
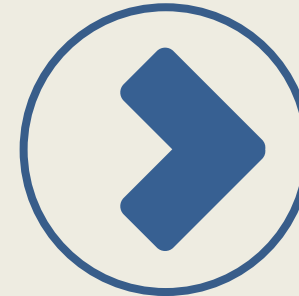
Board adopts user friendly document practices (i.e. plain language, large type, color coding, reduced jargon).

Board has user friendly meetings (i.e. additional time to understand the discussion & decisions, zero acronyms, everyone is part of the discussion).

3. Full Participation:
Individual has what they need to be actively involved

3. Full Participation:
Individual has what they need to be actively involved

Individual accommodations include <mark>frequent breaks</mark>

Individual receives on-going <mark>board training</mark>

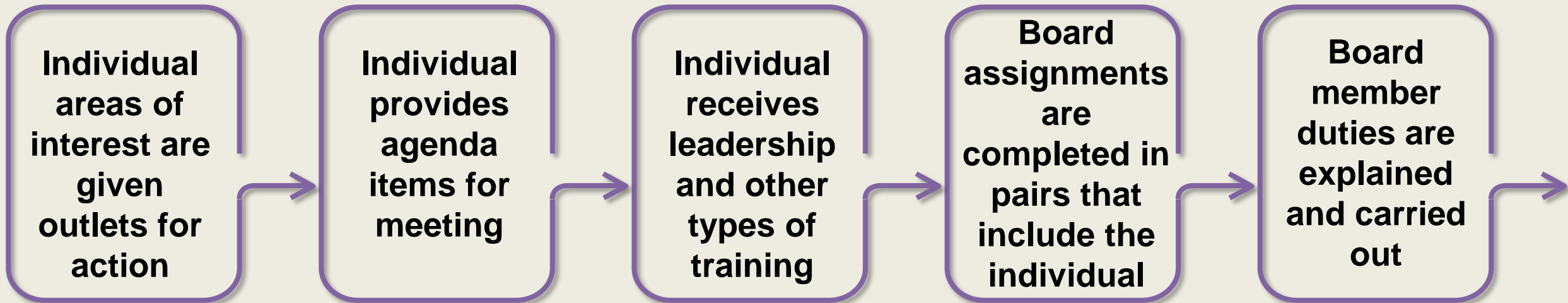Individual participates in <mark>committees or sub-committees</mark>

Board membership includes <mark>two or more individuals</mark> with disabilities

Board <mark>maintains contact</mark> with the individual between meetings.

4. Meaningful Ways to Contribute:
Individual has roles and responsibilities that help the group

4. Meaningful Ways to Contribute:
## Individual has roles and responsibilities that help the group

| Individual areas of interest are given outlets for action | → | Individual provides agenda items for meeting | → | Individual receives leadership and other types of training | → | Board assignments are completed in pairs that include the individual | → | Board member duties are explained and carried out | → |

5. True Influence:
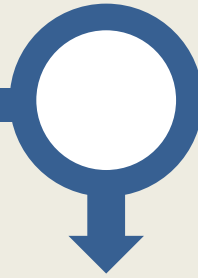## Individual feels like they are making a difference

5. True Influence:
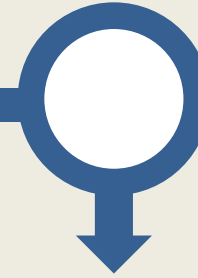Individual feels like they are making a difference
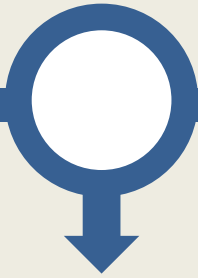
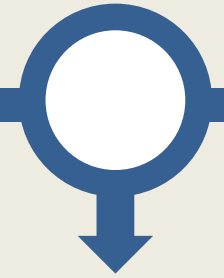Individual is in leadership or co-leadership role
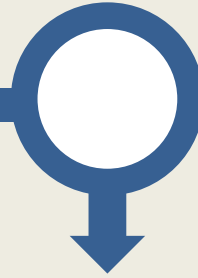
Individual's suggestions and/or ideas are adopted by the board

Individual participates in efforts to educate policymakers or other stakeholders

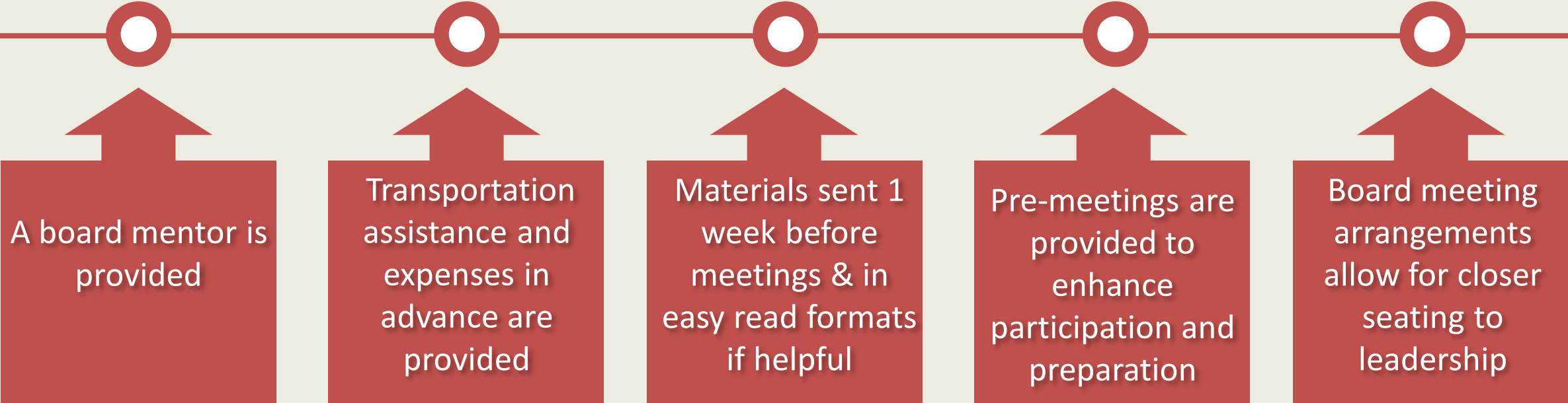Board and organization have written by-laws and policies that require inclusive practices

Board rotation adds new individuals with different voices and perspectives

6. Mentors and Supports
Tools and coaching opportunities needed to prepare and be effective at board meetings

6. Mentors and Supports: Tools and coaching opportunities needed to prepare and be effective at board meetings

A board mentor is provided

Transportation assistance and expenses in advance are provided

Materials sent 1 week before meetings & in easy read formats if helpful

Pre-meetings are provided to enhance participation and preparation

Board meeting arrangements allow for closer seating to leadership

Board Inclusion: Next Steps

Form Board Inclusion Team
- Exec. Dir, President, 2-3 Board Members, person with disability).
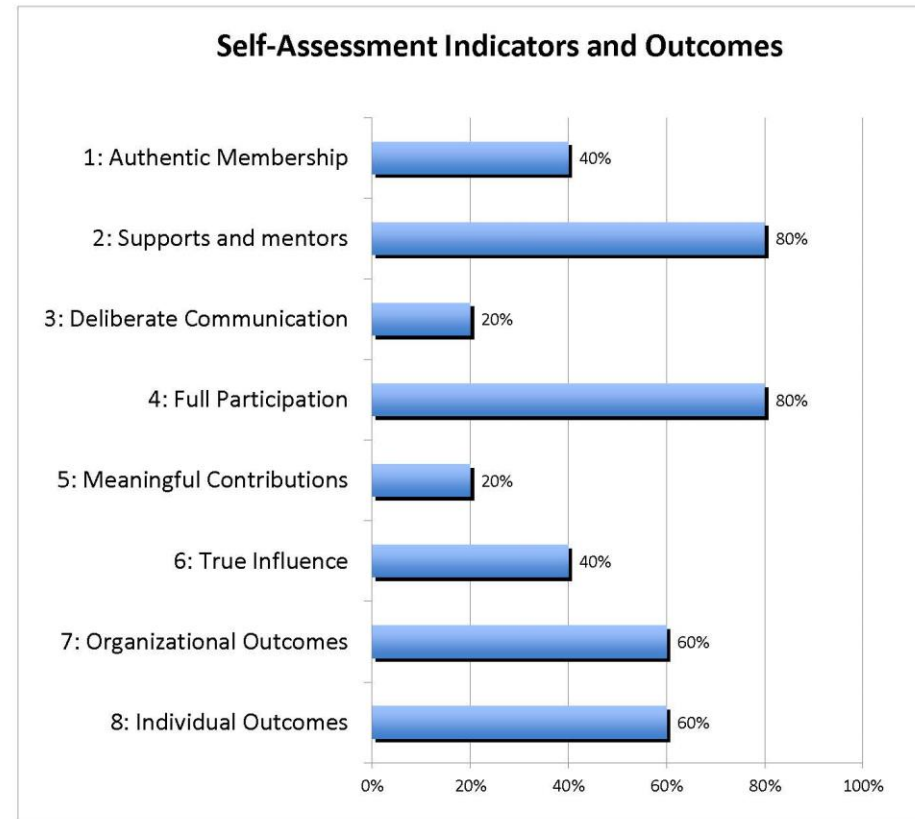- Self-Assessment

Person is Engaged

Use Plain Language materials

Provide Supports

Mentors provided

Board Inclusion
Organization Self Assessment

The purpose of the Beyond Tokenism Self-Assessment Tool is to help organizations improve their capacity to fully include people with disabiltities in their governance and organizational activities. The assessment will held an organization identify its strengths and weakessess and determine where it can most effectively focus its improvment efforts.

Part 1: Key Indicators of Inclusive Practice (Put a 1 in each box that is mostly true and a 0 for those items that are mostly untrue)

Section 1: Authentic Membership

Equal status, recognition and the individual's presence as board member.

1. Individual is provided board orientation	0
2. Individual attends board meetings, retreats and fellowship opportunities	1
3. Individual's interests match the needs of the organization	0
4. Board and management are committed to inclusion	0
5. Board has designated a budget for inclusion supports	1
Total Points	**2**

Section 2: Supports and Mentors

Tools and coaching opportunities needed to prepare for and be effective at board meetngs.

6. Individual is provided with a board sponsor or mentor	1
7. Individual receives needed assistance with transportation arrangements and expenses in advance of meetings	1
8. Individual receives materials at least one week prior to meetings and in alternative formats if helpful.	1
9. Pre-meetings are provided to enhance participation and preparation.	1
10. Board meeting arrangements are altered to allow for closer seating to leadership or speakers	
Total Points	**4**

Section 3: Deliberate Communication

Consideration of the way the individual receives, processes and expresses information and ideas.

11. Individual is afforded use of technology to prepare and participate in meetings.	0
12. Individual's communication style or use of interpreter is factored into board discussions	0
13. Individual is routinely called upon for their input and asked for clarification when needed.	1
14. Board adopts user friendly document practices (i.e. plain language, large type, color coding, reduced jargon).	0
15. Board adopts user friendly meeting practices (i.e. additional time is taken to ensure everyone understands the discussion and decisions, unfamiliar terms and acronyms are explained, everyone is part of the discussion).	0
Total Points	**1**

Self-Assessment Chart

Self-Assessment Indicators and Outcomes

Indicator	Value
1: Authentic Membership	40%
2: Supports and mentors	80%
3: Deliberate Communication	20%
4: Full Participation	80%
5: Meaningful Contributions	20%
6: True Influence	40%
7: Organizational Outcomes	60%
8: Individual Outcomes	60%

Board Inclusion: Next Steps

Form Board Inclusion Team (Exec. Dir, President, 2-3 Board Members, person with disability).

1. Self-Assessment
2. Choose a Module for the second training session and set a date.
3. Develop Work Plan
   a. Identify Board member(s) to serve as a mentor(s) for monthly support sessions (David will assist by attending)
   b. Identify person(s) with a developmental disability to serve on the Boa
   c. Plan and host Board Inclusion quarterly meetings.
4. Technical Assistance provided
   a. Technical assistance sessions with Board Inclusion Team (Quarterly)
   b. Mentor meetings with person(s) with disability (Monthly)

Training Modules
Six Elements of Board Inclusion

1. **Authentic Membership** – Recruiting and onboarding people to become equal members of the Board.

2. **Deliberate Communication** – Creating user friendly information.

3. **Full Participation** – Actively involving people in the group.

4. **Meaningful Ways to Contribute** – Creating roles and responsibilities for people to make a contribution.

5. **True Influence** – Helping people make a difference

6. **Mentors and Supports** – Providing needed help to be effective.

Board Inclusion Workplan

Workplan Item	Outcome	Responsible Party	Target Date	Completion Date
1. Form Board Inclusion Team (President, 2-3 board members, executive director)				
a. Identify Board Mentor to attend mentor training and monthly support sessions				
b. Identify individual(s) with a disability to serve on the board				
c. Choose and set date for training second training module				
Technical Assistance Plan				
2. Schedule quarterly TA Sessions with Board Inclusion Team				
3. Schedule mentoring sessions with individual(s) with a disability				

Resources

1. Six elements of Board Inclusion and training Modules (Handout)
2. Mentors (Handout)
3. Board Inclusion Initial Work Plan (Handout)
4. Effective Strategies for Supporting Individuals With Complex Needs in Leadership Roles (Google drive)
5. Beyond Tokenism Research Articles (Google drive)
6. Today's PowerPoint (Google Drive)
7. https://drive.google.com/drive/folders/1KHVtGhbcxHDeGVzaaTRd3dPJrFzwkNzn?usp=sharing
8. Website www.boardinclusion.com

Wrap-Up

Post Three Words On How
the Training Went
For You in the Chat Box

For more information contact Mark Friedman, Ph.D.
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Chat box Inserts

1. Discussion Question
   1. What is one personal goal you have for serving on the Board?
2. Video: Peter Burns & Betty Williams
3. Video: Tia Nelis & Nancy Thaler
4. Handouts:
   1. Slide 44: Mentors
   2. Slide 45: Next Steps
   3. Slide 46: Self-Assessment
   4. Slide 48: 6 Elements of BI Training Modules
   5. Slide 49: Initial Work Plan
   6. Slide 50: Resources
5. Inserts: Resources all available online Google Drive
   https://drive.google.com/drive/folders/1KHVtGhbcxHDeGVzaaTRd3dPJrFzwkNzn?usp=sharing