OUTCOMES

- Increase provider input and participation
- Advocate for mental health/substance use disorder issues in the community
- Improve stakeholder input
- Develop a draft plan for advocacy efforts

ADVOCACY

- Definition of advocacy: Advocacy is a political process by an individual or group that aims to influence public policy and resource allocation decisions within political, economic, and social systems and institutions.
  - Media campaigns
  - Public speaking
  - Publishing research
  - Lobbying

WHAT IS YOUR ISSUE?

- What is the current situation?
  - “Stats and stories”
  - Have data to support your statements
  - Talk to individuals with lived experience
  - Talk to others who are interested in your issue
- What do you want it to look like?
- How do you want it to be different?
- What is realistic?
ACTION PLANNING

• “Victory”
• Current reality
• Key actions
• Timeline
• Coordination

ACTION PLANNING “VICTORY”

• Create an image of success and develop excitement about the issue
• Brainstorm your image of a “perfect” completion. Step into the future and visualize the final outcome.

ACTION PLANNING CURRENT REALITY

Acknowledging the current reality surrounding the issue.
• Think of the group of people working on the project: List the strengths that will lead to “victory” and the weaknesses that threaten the accomplishment of victory.
• Think of success: List the potential benefits of pursuing the issue and the potential dangers of succeeding in the task.
ACTION PLANNING
KEY ACTIONS

• Identify tasks that need to be completed

ACTION PLANNING
TIMELINE

• What is your timeline to complete the event?
• What are the timelines for various actions that you need to complete?

ACTION PLANNING
COORDINATION

• Coordinate the actions on the plan with others who can help you
ADDRESS YOUR ISSUE:

• Presentation to a group
• Article in the newspaper
• Blog
• “Letter” campaign

PRESENTATION TO A GROUP: WHO IS YOUR AUDIENCE?

• Who needs to take the action on the issue you are trying to address?
  – County Board of Supervisors
  – Local Mental Health Board/Commission
  – Local legislator for representing you in the CA Assembly or CA Senate
  – Local service clubs or groups
  – Others

PRESENTATION: WHAT APPROACH WILL YOU TAKE?

• There are many ways to take your message to your audience and each one requires a different approach:
  – Oral presentation at a meeting
  – Mail/email/postcard campaign
  – Newspaper or television
  – Personal meeting with individuals
How many of you have made a presentation to a group?

PRESENTATION TO A GROUP: PREPARATION

- Prepare your presentation carefully
- Know the rules of the group
- Decide if the use of PowerPoint is appropriate or not
- Prepare a handout or letter that includes your key points for distribution

PRESENTATION TO A GROUP: PREPARATION

What are the qualities of a good presentation?

- Introduce yourself and other speakers with context
- State your topic
- Describe the current situation
- Describe the change you want and what it will look like
- ASK for what you want from the group
PRESENTATION TO A GROUP: PREPARATION

- Know the rules/procedures for the group including when and how long you will speak
- Prepare your speakers and practice
- If you use handouts, prepare and adequate number for everyone who will hear the presentation
- If you are using a PowerPoint, prepare for the presentation with the clerk of the organization

PRESENTATION TO A GROUP: BROWN ACT

Know when the group meets and how their meetings work:
- Public comment
- Agenda item
- Speakers
- Handouts

PRESENTATION TO A GROUP: POWER POINT

- Remember when you use a PowerPoint presentation the audience looks at the screen and not at you
- NEVER EVER read your PowerPoint slides
- Limit the number of slides
- Each slide should contain a few words or pictures to convey a thought and the discussion should last for about 2-3 minutes
- Using animation and sound in a slide is sometimes distracting and “not professional”
- Are PowerPoint slides a good handout for this presentation?
PRESENTATION TO A GROUP: HANDOUTS

- A good handout reflects your major points
- Leave room for note-taking
- Make handouts that can be printed in black/white

How many of you have made a presentation to an editorial board of a newspaper?

NEWSPAPERS: EDITORIAL BOARDS

- An “editorial board” is a group of editors at your local newspaper who may meet with you to discuss your issue.
- How do you prepare for a meeting with an “editorial board”?
How many of you have been interviewed by a newspaper reporter?

NEWSPAPERS: INTERVIEW WITH A REPORTER

- Newspapers are both printed and on-line
- REMEMBER THAT NOTHING IS “OFF THE RECORD”
- Develop a relationship with a reporter who can be your champion
- When a reporter calls, ask for some basic information and get back to him/her
- Don’t read the “comments” unless you want to raise your blood pressure...

SOCIAL MEDIA: BLOGS

- “Blog” is short for weblog
- Developing your own blog
- Responding to other blogs
MAIL CAMPAIGNS

- Are they a thing of the past?
- Mailing campaign strategy: postcards
- Focused mailing efforts

LET'S WORK THROUGH AN ACTION PLAN FOR A PROJECT:
FUNDING FOR A HEALTH AND WELLNESS CENTER

- Victory
- Current reality: strengths of the project group
- Current reality: weaknesses of the project group
- Current reality: benefits of the project
- Current reality: dangers/problems from the project

LET'S WORK THROUGH AN ACTION PLAN FOR A PROJECT:
FUNDING FOR A HEALTH AND WELLNESS CENTER

- Key Actions
- Timelines
- Coordination
LET'S WORK THROUGH AN ACTION PLAN FOR A PROJECT:

PRESENTATION TO THE MENTAL HEALTH BOARD
- What are the rules for presentations?
- Who will make the presentation?
- Will we use a PowerPoint presentation?
- What handouts do we need?
- What groups will we invite to support our proposal? (e.g., people with lived experience, the newspaper reporter who is our champion)

FUNDING FOR A HEALTH AND WELLNESS CENTER

"You've got to be very careful if you don't know where you're going, because you might not get there."
- Yogi Berra

Thank you and good luck with your advocacy efforts!

Susan Morris Wilson
susanmorriswilson@gmail.com
EFFECTIVE ADVOCATING WITH LOCAL GOVERNMENT:
How To Tell Your Story

VICTORY:

CURRENT REALITY:

STRENGTHS OF THE GROUP:

WEAKNESSES OF THE GROUP:

BENEFITS OF THE PROJECT:

DANGERS/PROBLEMS WITH THE PROJECT:
AB 1234 ETHICS TRAINING: TRAINING FOR LOCAL OFFICIALS

On October 7, 2005, the Governor signed Assembly Bill No. 1234. AB 1234 requires that if a local agency provides any type of compensation, salary, or stipend to, or reimburses the expenses of a member of its 'legislative body' (as that term is defined in California Government Code Section 54952), that local agency's officials must receive training in ethics.

The bill also provides that if an entity develops criteria for the ethics training required by AB 1234, then the Fair Political Practices Commission and the Attorney General shall be consulted regarding any proposed course content. Other than the consultation requirement regarding the training course, the Commission has no jurisdiction to interpret or advise on the requirements of AB 1234. In response to AB 1234’s requirement that the Commission be consulted regarding proposed course content, the Commission has implemented Regulation 18371. Please see Regulation 18371 for information on what the Commission has determined should be included in a local ethics training course. A link to Regulation 18371 and the Attorney General's Office's AB 1234 information can be found below.

There are numerous training options, including training conducted by commercial organizations, nonprofits, or even an agency's own legal counsel. In addition, interested parties have collaborated to create an on-line training program that will allow local officials to satisfy the requirements of AB 1234 on a cost-free basis. The training may be accessed by clicking the button below, and at the end of the training a certification of completion must be printed.

http://localethics.fppc.ca.gov/login.aspx
The free online training offered here is a self-serve training program. It is your obligation to print a certificate and provide it to your agency in a timely manner. Please allow ample time to ensure that you are able to complete the training by the due date.
EFFECTIVE ADVOCATING WITH LOCAL GOVERNMENT
How To Tell Your Story

<table>
<thead>
<tr>
<th>KEY ACTIONS</th>
<th>TIMELINE</th>
<th>COORDINATION</th>
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BOARD EVALUATION:

Our board prepares to do its job by...
1. ____ YES     _____ NO: Conducting a thorough orientation for all board members.
2. ____ YES     _____ NO: Integrating new members into the team as quickly as possible.
3. ____ YES     _____ NO: Attending board development trainings.
4. ____ YES     _____ NO: Performing an annual self-evaluation of board operations.
5. ____ YES     _____ NO: Providing all board members with copies of the mission statement, bylaws, Welfare and Institutions Codes regarding the board, long-range plan, and all other documents of the organization such as, board rooster, Committee list and who is on them, etc.
6. ____ YES     _____ NO: Touring all facilities at least once a year.

Our board ensures good meetings by...
7. ____ YES     _____ NO: Limiting most meetings to two hours or less.
8. ____ YES     _____ NO: Providing a comfortable meeting room conducive to business.
9. ____ YES     _____ NO: Convening and adjourning on time.
10. ____ YES     _____ NO: Sticking to the prepared agenda.
11. ____ YES     _____ NO: Working for Consensus rather than lighting for a majority.
12. ____ YES     _____ NO: Following a business-like system of parliamentary rules.
13. ____ YES     _____ NO: Including the Mental Health Director as a resource for all deliberations.
14. ____ YES     _____ NO: Confining all discussions to policy issues and avoiding management issues.
15. ____ YES     _____ NO: Allowing encouraging all board members to participate in the discussions.

Individual board members...
16. ____ YES     _____ NO: Attend at least 90% of all board meetings and committee meetings to which they are assigned.
17. ____ YES     _____ NO: Come to meetings prepared to discuss agenda issues.
18. ____ YES     _____ NO: Come to meetings on time.
19. ____ YES     _____ NO: See yourself as a part of a team effort
20. ____ YES     _____ NO: Act as lobbyists for the Mental Health Department.
21. ____ YES     _____ NO: Know your responsibility as a representative of your board.
22. ____ YES     _____ NO: Attempt to exercise authority only during official meetings of the board.
23. ____ YES     _____ NO: Represent the board interest of all those who use the system and not just personal or special interests.
24. ____ YES     _____ NO: Understand the most efficient way to govern is to delegate management to the Mental Health Director.

Our board plans for the future of the mental health department by...
25. ____ YES     _____ NO: Annually reviewing and approving the mission statement, the programs and services.
26. ____ YES     _____ NO: Annually reviewing progress toward the long-range plan and modifying the long-range plan.
27. ____ YES     _____ NO: Operating from opportunity to opportunity rather than Crisis to crisis.
Reinforcements and solutions:

*In which of the major categories above does your board show strength?*

*In which of the major categories above does our board need improvement?*

**NOTE:** This survey was reproduced from *The Cain Consulting Group* in their *The Board Team Handbook*. It is an excellent book for boards.
A Mental Health Board Evaluation of Meetings

The outcome of any meeting depends heavily on the process. A well-organized and well-managed meeting produces good results. A disorganized meeting produces frustration and anger and does nothing for your mental health department or the goals of your board.

By having each board member answer the following questions, your board will know the areas that need improvement.

Circle the response that best describes your meeting:

1. Do meetings begin and end on time? .......................... YES  NO  SOMETIMES
2. Do meetings have a positive tone? ............................. YES  NO  SOMETIMES
3. Does the board chairperson lead the meetings? .............. YES  NO  SOMETIMES
4. Does everyone come prepared? ................................. YES  NO  SOMETIMES
5. Do board members stick to the agenda? ......................... YES  NO  SOMETIMES
6. Does the board work for consensus? .......................... YES  NO  SOMETIMES
7. Do all members participate in discussions? ..................... YES  NO  SOMETIMES
8. Are all meetings completed in less than two hours? .......... YES  NO  SOMETIMES
9. Is the Mental Health Director encouraged to participate? ....... YES  NO  SOMETIMES
10. Is the meeting room comfortable? .............................. YES  NO  SOMETIMES
11. Has the board agreed on a parliamentary resource such as Robert’s Rule of Order? ................................. YES  NO  SOMETIMES
12. Does the board have enough information to make decisions about agenda items? ................................. YES  NO  SOMETIMES
13. Do at least 90-95% of the members attend? .................... YES  NO  SOMETIMES
14. Does the agenda focus on policy issues rather than management issues? .......... YES  NO  SOMETIMES
15. Are board members equal in the discussions and not dominated by one or two members? .............................. YES  NO  SOMETIMES
16. Do board committees demonstrate that they are working and producing results? ... YES  NO  SOMETIMES
17. Is discussion cordial and does it avoid personal attacks? .. YES  NO  SOMETIMES
18. Do board members feel free to express even dissenting viewpoints? ..... YES  NO  SOMETIMES
19. Do board members leave the meeting still feeling like a team? ........ YES  NO  SOMETIMES
20. Do board members leave the meeting with a feeling of accomplishment? ...... YES  NO  SOMETIMES

Evaluation follow-up:

If you circled any “NO” or “SOMETIMES” responses, list below the actions you will take to correct the problem so your meeting will run better and produce better results.
The President can vote only to break a tie.

**NO:** the presiding officer has the same rights as any other member of the body. The presiding officer of an assembly of more than about a dozen members should make every effort to maintain an appearance of impartiality so that members on both sides of any issue can feel confident they will receive fair treatment. To this end the chair does not participate in debate on any issue unless (s)he gives up the chair. The chair votes only when either

- The vote is by ballot, in which case the chair votes along with and at the same time as all other members, or
- The chair’s vote will change the result of the vote.

Once a quorum has been established it continues to exist no matter how many members leave during the course of the meeting.

**NO:** Even when a meeting begins with a quorum present, it loses its right to conduct substantive business whenever enough members leave to bring attendance below the level of a quorum. It can resume substantive business only when enough members return, or other members arrive, to give it a quorum again.

Abstention votes count.

**NO.** Abstentions are instances in which members who are present refuse to vote. In the usual situation where either a majority vote or a two-thirds vote is required, abstentions are not counted and have no effect on the result. However, if the vote required is a majority or two-thirds of the members present, an abstention has the same effect as a “no” vote.

A member with a conflict of interest with respect to a motion cannot vote on the motion.

**DEPENDS:** Brown Act is YES.

**RRONR NO:** You should not vote on a question in which you have a direct personal or monetary interest not common to other members. However, you cannot be compelled to abstain because of such a conflict of interest.

Debate on a motion must stop as soon as any member “calls the question”.

**SORT OF:** The proper wording to close debate on the immediately pending motion is to say “I move the previous question”. The body then needs to vote on that motion with a 2/3 vote for adoption. If the motion passes, the body will immediately consider the previous motion with no further debate. Cutting off debate infringes on the right of members to speak, thus debate should never be limited without following the proper procedure.

Anyone can add an item to an agenda.

**RRONR YES:** For a proposed agenda to become the official agenda for a meeting, it must be adopted by the assembly at the outset of the meeting. At the time that an agenda is presented for adoption, it is in order for any member to move to amend the proposed agenda by adding any item that the member desires to add, or by proposing any other change.

**BROWN ACT NO:** The agenda provided at least 72 hours in advance of the meeting is the official agenda and cannot be modified except in emergency situations.

Minutes of a meeting need to contain all the information from the meeting.

**NO:** Not only is it not necessary to summarize matters discussed at a meeting in the minutes of that meeting, it is improper to do so. Minutes are a record of what was done at a meeting, not what was said.

A board meeting cannot be held by telephone.

**NO:** You may hold board meetings by conference telephone call only if your bylaws specifically authorize you to do so. If they do, such meetings must be conducted in such a way that all members participating can hear each other at the same times, and special rules should be adopted to specify precisely how recognition is to be sought and the floor obtained during such meetings.

Revised 12/31/2010
### FACILITY MONITORING CHECKLIST:

<table>
<thead>
<tr>
<th>Facility Name:</th>
<th>Address:</th>
<th>Date of Review:</th>
<th>License is dated:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>and has the following exceptions:</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Name of Reviewers:</td>
</tr>
</tbody>
</table>

The facility is clean and safe based on the following:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Code</th>
<th>Met</th>
<th>Needs Work</th>
<th>Unmet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temperature is comfortable and safe</td>
<td>(T22 80088)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Facility and grounds are free of hazards</td>
<td>(T22 80087)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Fire alarms/extinguishers are operable</td>
<td>(T22 80020)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client bedrooms are clean and afford privacy</td>
<td>(T22 80087)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client bathrooms are clean and afford privacy</td>
<td>(T22 80087)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Toxic items are safely stored</td>
<td>(T22 80087)</td>
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</tbody>
</table>

Food service provides meals that appear to be of quantity and quality necessary to meet the needs of the clients:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Code</th>
<th>Met</th>
<th>Needs Work</th>
<th>Unmet</th>
</tr>
</thead>
<tbody>
<tr>
<td>An adequate food supply is available</td>
<td>(T22 80076)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food is adequately stored</td>
<td>(T22 90076)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sanitation practices are adequate</td>
<td>(T22 80076)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Residents with special diets receive appropriate food and have prescriptions on file</td>
<td>(T22 80076)</td>
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</tbody>
</table>

Centrally stored medications are locked                                      | (T22 80075)|     |            |       |

Facility staff has training in First Aid                                      | (T22 80075)|     |            |       |

First aid supplies and manual are available                                  | (T22 80075)|     |            |       |

Fire drills are practiced monthly and documented                             | (T22 80023)|     |            |       |

Vehicles transporting clients are in good repair                             | (T22 80074)|     |            |       |

Facility maintains records of accounts of cash resources, personal property and valuables entrusted to the facility including:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Code</th>
<th>Met</th>
<th>Needs Work</th>
<th>Unmet</th>
</tr>
</thead>
<tbody>
<tr>
<td>A current ledger</td>
<td>(T22 80026)</td>
<td></td>
<td></td>
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<tr>
<td>Supporting receipts for purchases</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>receipts for client cash expenditures</td>
<td></td>
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</table>

Cash resources are locked and secure on the premises                          | (T22 80026)|     |            |       |

Comments:
ROBERTS RULES OF ORDER
QUIZ

_____ The President can vote only to break a tie.

_____ Once a quorum has been established it continues to exist no matter how many members leave during the course of the meeting.

_____ Abstention votes count.

_____ A member with a conflict of interest with respect to a motion cannot vote on the motion.

_____ Debate on a motion must stop as soon as any member calls the question.

_____ Anyone can add an item to an agenda.

_____ Minutes of a meeting need to contain all the information from the meeting.

_____ A board meeting cannot be held by telephone.