

# Developmental Disabilities Council Chair Orientation Manual



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Reading Level 7.6

## Foreword

Being the Chair of a Developmental Disabilities (DD) Council is an important leadership role. The Council is created by a federal law called the Developmental Disabilities Assistance and Bill of Rights Act (DD Act). This law says that people with developmental disabilities have the right to live, work, and be included in their communities.

As Chair, you help lead this work.

Your job is to:

- Guide meetings
- Make sure everyone is heard
- Help the Council follow the law
- Make sure federal money is used the right way
- Keep the Council focused on real results

The DD Act says Councils must:

- Support independence
- Promote self-advocacy
- Protect rights
- Improve systems
- Measure results

The Chair helps make sure these things happen.

Being Chair means:

- Listening to self-advocates and families
- Making sure decisions are fair
- Helping members work together

- Keeping the Council focused on its Five-Year State Plan
- Supporting clear and honest communication

Public accountability is very important. DD Councils receive federal funding through the Administration for Community Living (ACL). That means the Council must follow the law, use funds carefully, and show the impact of its work.

**Impact is what matters most.**

Success is not about how many meetings are held. Success is about change:

- Barriers removed
- Policies improved
- Communities more inclusive
- People with developmental disabilities having more choice and control in their lives

This guide is here to support you. It explains your role in plain language and provides tools to help you lead with confidence.

Thank you for stepping forward to serve. Your leadership helps create stronger systems and better lives for people with developmental disabilities.

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## How to Use This Guide

This manual is organized by leadership responsibility. You can read it cover-to-cover or use it as a targeted reference depending on your experience level.

## If You Are a New Chair

Start with the essentials and build your confidence in stages:

### 1 Begin with Part I – Foundations of the Chair Role

- Understanding the purpose of the Chair position
- The public leadership role
- Key expectations and mindset
- Overview of Council authority and structure

This section establishes your leadership foundation.

### 2 Move to Part II – Core Leadership Responsibilities & Working with Members

- Setting tone and culture
- Engaging diverse members
- Facilitating participation
- Managing difficult dynamics
- Leading with inclusion and accountability

This section helps you lead people effectively.

### 3 Review Part III – Running Effective Council Meetings

- Agenda development
- Parliamentary basics
- Voting procedures

- Handling motions
- Maintaining order and fairness

Use this before your first meeting as Chair.

#### 4 Study Part IV – Governance & Organizational Relationships

- Chair and Executive Director partnership
- Relationship with Council members
- Committee oversight
- Strategic plan alignment

This section clarifies your role within the larger governance structure.

#### 5 Finish with Part V – Legal, Personnel, and Accountability Responsibilities

- Fiduciary duties
- Conflict of interest
- Executive Director evaluation
- Compliance and public accountability

This ensures you understand your legal and oversight obligations.

#### 6 Keep Part VI – Tools, Checklists & Practical Tips Nearby

- Quick reference sheets
- Meeting scripts
- Evaluation templates
- Planning checklists

Use this section as your working toolkit.

## **If You Are an Experienced Chair**

You may not need to start at the beginning. Instead, use this guide strategically:

### **For Leadership Refresh**

→ Review Part II to strengthen member engagement, equity practices, and leadership tone.

### **For Meeting Improvement**

→ Revisit Part III for advanced facilitation techniques and motion management.

### **For Governance Strengthening**

→ Focus on Part IV and Part V to reinforce accountability, compliance, and Executive Director partnership.

### **For Strategic Planning or Transitions**

→ Use Part I and Part IV to realign leadership purpose and governance structure.

### **For Practical Application**

→ Go directly to Part VI for ready-to-use tools and templates.

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## **Suggested Reading Paths**

### **Quick Start Path (2–3 hours):**

- Part I (overview)
- Part III (meeting basics)
- Part VI (tools)

### **Deep Governance Path:**

- Part II

- Part IV
- Part V

**Annual Self-Assessment Path:**

- Part II (leadership effectiveness)
- Part III (meeting quality)
- Part V (accountability responsibilities)

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**How to Use This Guide Throughout Your Term**

- Before meetings → Review Part III
- During planning cycles → Revisit Part IV
- During evaluations → Reference Part V
- When facing conflict → Return to Part II
- For quick answers → Use Part VI

## **PART 1: Foundations of the Chair Role**

*Understanding the purpose, authority, structure, and legal framework of the DD Council.*

## 1. The Chair's Purpose

### Supporting the Council's mission and vision

- The Chair helps the Council stay focused on its **mission and vision**.
- The Chair helps make sure the Council **meets its goals**.

### Advancing the State Plan

- The Chair guides the Council in putting the **State Plan** into action.
- The Chair helps members understand:
  - Which decisions will move the work forward
  - How their decisions support Council goals

### Supporting good governance

- The Chair supports **good governance** (how the Council does its work).
- The Chair sets a **positive and respectful tone** for Council meetings.
- The Chair helps meetings stay focused, fair, and productive.

### Engaging members

- The Chair encourages participation from all members.
- The Chair builds on each member's **strengths and experience**.
- The Chair helps members feel valued and included.

### Clarifying roles and responsibilities

- The Chair helps members understand:

- Their **roles**
- Their **duties**
- The Chair helps members know what decisions are needed and when.

**Key Message: The Chair guides, supports, and engages the Council helping members work together to achieve shared goals.**

## 2. Leading as a Public Official

### What it means to be a public official

- A DD Council member is a **public official**.
- A public official is someone who:
  - Serves on a **governing body**
  - Helps make decisions for the public good

### Appointment by the Governor

- Public officials are often **appointed by an elected leader**.
- For the DD Council:
  - The **Governor** appoints Council members.

### Stewardship of public funds

- Make decisions about how **public money** is used.

### Service to the public good

- Work to benefit the **public**.
- Help carry out the program's purpose.

## Key Message

### DD Council members are public officials because they:

- Serve the public.
- Help decide how federal funds are used.
- Play a role in improving systems and support for people with I/DD.

## 3. The Chair as a Public Official

### Representing the Council

- As Chair, you **represent the Council** to others.

### Connecting the Council to the public

- The Chair is a **link** between the DD Council and the people in the State or Territory.
- Communication responsibilities (typically identified in bylaws or operational policies).

## 4. What the Chair Needs to Know About the DD Act

### Purpose of the DD Act

- The DD Act is a federal law that **supports people with developmental disabilities (I/DD)**.
- It helps States and Territories plan, fund, and carry out programs that **improve lives**.

### Key areas covered by the law

The DD Act provides guidance about:

- **Purpose:** Why the Council exists

- **Funding:** How federal money is provided
- **State Planning & Implementation:** How States develop and carry out a plan
- **Membership:** Who serves on the Council
- **Designated State Agencies:** State offices that support the Council
- **Cost-Sharing:** How funds may be shared or matched
- **Reports & Compliance:** Rules for accountability

### What the Chair should focus on

It's helpful for the Chair to understand:

- **Membership:** How Council members are selected and rotated.
- **State Plan:** How the Council sets priorities and goals.
- **Implementation:** How the Council carries out the State Plan.
- **Federal Funding Basics:** How money is used and tracked.
- **DD Network Partners:** Other organizations and agencies that work with the Council.

### Available resources

- **Executive Director:** Your most important resource for understanding the law.
- **Council Staff:** Can help explain rules, reports, and funding requirements.
- **Training Materials:** Information to stay informed.

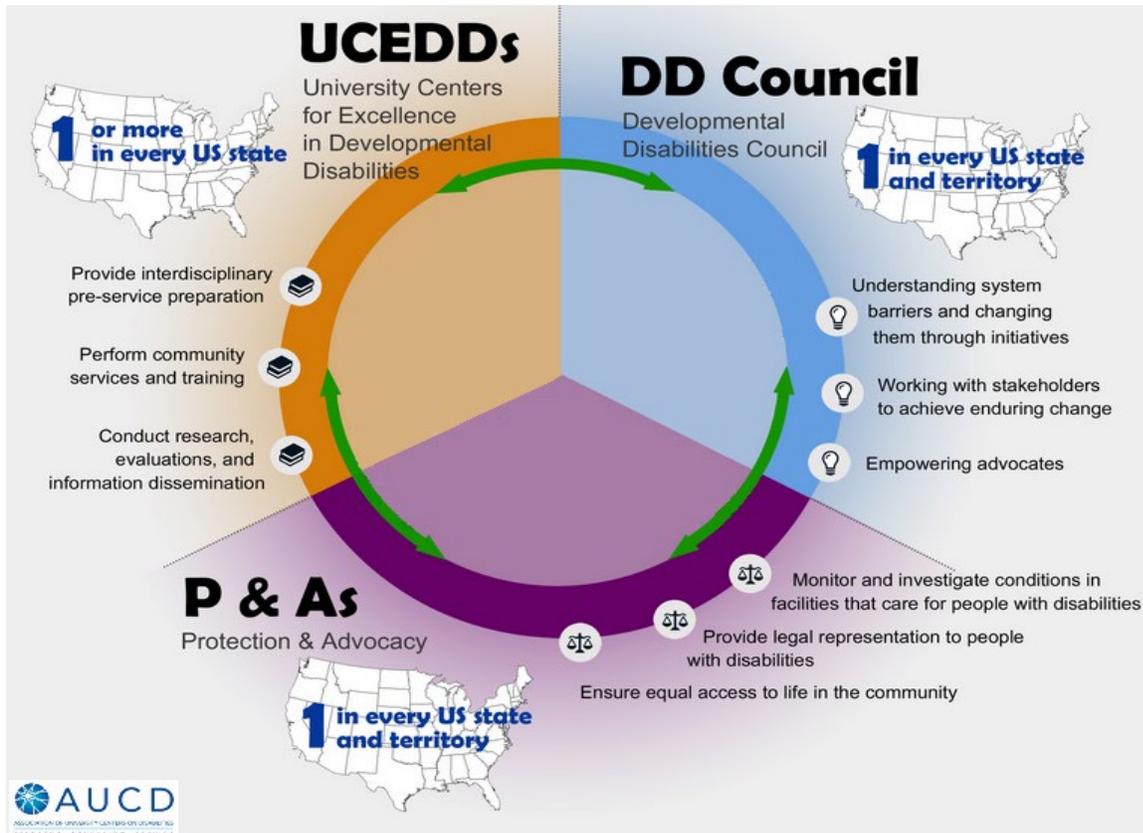
## Key Message

The DD Act is the **foundation of the Council's work.**

As Chair, you don't need to memorize every detail, but you should:

- Understand the **big picture.**
- Know where to get help.
- Be able to explain **how the Council works and why it matters**

## 5. DD Act Partners



## DD Councils

- DD Councils bring people together to improve systems, influence policy, and create change.

- They focus on making communities more inclusive and improving services and support.

### Protection & Advocacy Systems

- P&As protect the legal and human rights of people with developmental disabilities.
- They help people when their rights are violated and work to stop abuse, neglect, and discrimination.

### University Centers for Excellence (UCEDDs)

- UCEDDs provide education, training, and research.
- They help develop leaders, improve services, and share knowledge with communities.

### How the partners work together

- The three DD Act Partners share information and plan together.
- They coordinate their work, so each partner's efforts support the others.

### They do different jobs

- Each partner has a unique role.
- Working together helps avoid duplication and strengthens results.

### They have the same goal.

All three partners work to help people with developmental disabilities and their families:

- Make their own choices.
- Be included in their communities.
- Live the lives they want.

## 6. Membership Composition & Requirements

### Citizen member requirements (60%)

These are people who represent **the voices of individuals and families**:

- People with intellectual or developmental disabilities (I/DD).
- Parents or guardians of children with I/DD.
- Immediate relatives or guardians of adults with I/DD **who cannot advocate for themselves.**

### Agency/organization member limits (40%)

These members represent **state or local agencies or organizations** that provide services or programs for people with I/DD:

- Vocational Rehabilitation
- Individuals with Disabilities Education Act (IDEA) programs
- Older Americans Act programs
- Maternal and Child Health programs
- Medicaid
- Protection and Advocacy programs
- University Centers of Excellence in Developmental Disabilities
- Local non-governmental agencies focused on I/DD services
- Private non-profit groups focused on I/DD services

### Special membership requirements

At least **one citizen member** must be a person with I/DD or an immediate family member of someone who **lives or has lived in an ICF/DD** (Intermediate Care Facility for people with I/DD).

## Rural/urban and cross-disability representation

Check that membership **reflects a wide range of people with different developmental disabilities from rural and urban areas in the state or territory.**

## Attendance expectations

- When a member misses a meeting, an **important point of view is missing.**
- Every member brings a unique experience and voice to the table.

## Membership rotation and appointments

Membership rotation:

- Is required by the **DD Act**
- Creates **leadership opportunities**
- Brings in **new ideas and perspectives**

Appointments

- The **Governor** is the only person who can appoint Council members.
- The DD Council **can recommend** potential members to the Governor.

## Recruitment and transitions

**The Chair Can:**

- Work with the **Executive Director** to identify what types of members are needed.
- Help share information about **open seats.**
- Take part in **recruitment efforts.**

## Preparing Members for Term End

- Encourage members to plan for the end of their term.
- Help members find **other leadership opportunities.**

## Ways to Support This

- Invite staff from the **Governor's Appointments Office** to speak at a meeting and have them share ways to stay informed of other opportunities.
- Ask **state agency Council members** to share other ways people can stay involved as leaders.

## 7. The 5-Year State or Territory Plan

### Development process

- Developed **every 5 years**.
- Council members, with staff support:
  - Review unmet or underserved needs of people with I/DD.
  - Set goals and objectives to address those needs.
- The State or Territory must provide **assurances** to support the plan.

### Annual updates

- The plan is **updated every year**.
- Council staff provide:
  - A projected budget for the next federal fiscal year (FFY)
  - Updated member and staff lists
  - Annual Work Plan updates
  - Other required updates

### Annual Work Plans

- Describe what the Council plans to do in a federal fiscal year.
- Include:
  - Goals and objectives
  - Key activities
  - Expected results (outputs and outcomes)

- Performance targets

### Ensuring progress

#### Council's Role

- Review and comment on progress toward plan goals.
- Use progress information to:
  - Make informed decisions
  - Adjust plans when needed
  - Stay on track

### Chair talking points

#### Member Engagement

- When members help develop the plan, they feel **more invested** in the work.
- As new members join:
  - Teach them about the plan.
  - Learn what interests and excites them.
- Encourage members to watch how activities are making a difference.
- Keep the focus on **progress**, not just tasks or reports.

## 8. Funding & Budget Basics

### Annual budget approval

- The DD Council approves a budget each year.
- The budget shows how the Council plans to use **federal funds** to do its work.
- It explains the plan to **ACL/AoD/OIDD** in numbers.

## Federal spending requirements (70/30 rule)

- **At least 70%** of the federal money must be used for **state plan activities** (the Council's work and projects).
- **No more than 30%** of the federal money can be used for **administrative costs**, such as:
  - Rent
  - Council meetings
  - Travel for staff and members
  - Office supplies

## Allowed expenses

- All spending must:
  - Follow **federal and state rules**.
  - Follow **state or territory purchasing rules**.

## Council role vs. staff role

### Council Role

- Decides what activities and projects to work on each year.
- Decides how federal funds should be used for state plan implementation.
- Approves the annual budget.
- Checks that the budget is being used as planned.

### State Agency & Financial Staff

- Make sure purchases are allowed.
- Make sure all rules and regulations are followed.
- Handle financial paperwork and oversight.

The Chair is **not** responsible for deciding whether spending follows funding rules.

**Key Message**

The Council decides **what** to fund.

Financial staff make sure funds are spent **the right way**.

Together, this ensures federal money is used responsibly.

## **PART 2: Leading the Council**

*Core leadership responsibilities, member engagement, and succession planning.*

## **9. Common Duties of a Council Chair**

### **Lead Council Meetings**

#### **Run meetings that are organized and inclusive.**

- Guide discussion and keep meetings on track.
- Make sure everyone has a chance to speak.
- Help the Council reach decisions respectfully.

### **Work on Meeting Agendas**

#### **Plan meetings with purpose.**

- Work with the Executive Committee and Executive Director to create the agenda.
- Focus meetings on important issues and decisions.
- Make sure members know what to expect.

## **10. The Chair's Role to the Membership**

The Chair is the main point of contact for Council members.

The Chair helps members feel informed, supported, and able to participate fully.

### **Key Responsibilities**

#### **1. Communicate Clearly**

- Share important information on time
- Explain decisions and next steps
- Make sure members understand Council expectations

#### **2. Be Approachable**

- Listen to members' questions or concerns
- Encourage members to share ideas
- Be open, friendly, and available

### 3. Support Members

- Help members understand their roles
- Provide guidance for challenges they may face
- Encourage skill-building and participation

### 4. Address Conduct Issues

- Address behavior or conflicts early and respectfully
- Focus on solving problems, not blaming people
- Keep the Council a safe and respectful place for everyone

### 5. Encourage Participation

- Invite members to contribute ideas and feedback
- Create ways for everyone to have a voice
- Recognize members' efforts and contributions

### **Why This Matters**

- Members feel supported, informed, and valued
- Decisions are stronger because everyone contributes
- Conflicts are managed calmly and fairly
- The Council runs smoothly and effectively

### **Key Message**

As Chair, your role is to support, guide, and communicate with the membership. You don't make decisions alone — you help the group work together and make the Council a place where everyone can contribute safely and effectively.

## **11. Engaging Council Members**

### **The Chair's role in engagement**

The Chair sets the tone for participation. How meetings are run and how members are supported directly affects engagement.

### **Why Engagement Matters**

Engaged Council members:

- Contribute a wide range of perspectives
- Share responsibility for Council work
- Strengthen trust and teamwork
- Improve decision-making

### **Strategies for the Chair**

#### **Create a Welcoming Environment**

- Encourage respectful discussion
- Invite quieter members to share
- Manage dominant voices fairly

#### **Communicate Clearly**

- Share agendas and materials in advance
- Clearly explain decisions and next steps

- Use plain language

### **Support Participation**

- Assign meaningful roles or tasks
- Match responsibilities to members' interests and strengths
- Rotate leadership and committee roles

### **Build Confidence and Skills**

- Encourage training and mentoring
- Pair new members with experienced ones
- Recognize progress and effort

### **Address Disengagement Early**

- Check in with members who are less active
- Ask about barriers to participation
- Offer support or adjustments where possible

#### **Key Message**

Engagement doesn't happen by accident; it requires intentional leadership. With clear communication, support, and encouragement, the Chair can help every member contribute.

## **12. Succession Planning**

Succession planning prepares new leaders to step into key roles when needed.

Leadership changes happen. Planning ahead helps the Council stay strong and stable.

## Role of the Chair

The Chair plays an important role in succession planning by:

- Regularly reviewing Council leadership and performance
- Making future leadership needs a priority
- Helping members grow into leadership roles

## How the Chair Can Build Leadership

The Chair can support leadership development by:

- Offering learning and training opportunities
- Mentoring Council members
- Encouraging and supporting members to take on leadership roles

## Benefits of Succession Planning

Succession planning helps the Council to:

- Reduce disruption when leaders leave unexpectedly
- Ensure smooth transitions into leadership roles
- Build a wider range of skills and knowledge among members
- Identify and address gaps in Council expertise

## Recruiting for the Future

- The Chair can help recruit new members who meet the Council's current and future needs
- Recruiting with succession planning in mind strengthens long-term leadership

## **13. Stepping Into the Chair Role: Overcoming Common Concerns**

It is normal to feel unsure when you become Chair.

These stages can help you feel more confident and prepared.

## **Stage 1. Clarify Your Motivation**

Know your “why.”

Ask yourself:

- Why do I care about this Council?
- Why did I want to serve as Chair?

Remembering your purpose can help you stay grounded during challenges.

## **Stage 2. Learn From Others**

Look at what worked—and what didn’t.

Think about past Chairs you have seen in action:

- What leadership behaviors worked well?
- What behaviors would you choose not to repeat?

Use these lessons to shape your own leadership style.

## **Stage 3. Prepare and Stay Informed**

Preparation builds confidence.

- Take time to learn about issues affecting people with ID/DD
- Review meeting materials ahead of time
- Come ready to guide discussion and keep meetings on track

You don’t need to know everything—but you should be prepared.

## **Stage 4. Build Strong Relationships**

You are not doing this alone.

- Build a positive, respectful working relationship with the Executive Director
- Communicate openly and regularly
- Treat leadership as a partnership

Strong relationships make the Chair role easier and more effective.

### **Stage 5. Allow Yourself to Be Imperfect**

No Chair has all the answers.

- Be honest about where you need support
- Ask for help, training, or clarification
- Learn as you go
- Being willing to ask for help is a strength, not a weakness.

## **PART 3: Leading Effective Meetings**

*Facilitating productive, fair, organized, and compliant meetings*

## 14. Running Effective Council Meetings

### Chair responsibilities

As Chair, you help make meetings work.

You are responsible for making sure meetings are:

- Productive
- Fair
- Organized

This means guiding discussion, following agreed-upon procedures, and making sure all members can participate.

### Owning the meeting role

- Open agenda items yourself
- Guide the discussion
- Do not turn the meeting over to the Executive Director

The Chair facilitates. The Director can support.

### Empowering committee chairs

Share leadership.

- Ask Committee Chairs to present their agenda items
- Support them in leading the discussion
- Step in when guidance or clarification is needed

This builds leadership across the Council.

### Preparation practices

#### **Build Your Meeting Skills**

Good meeting skills can be learned.

- Seek training if running meetings feels challenging
- Learn from other Chairs or mentors
- Practice facilitation techniques

Needing training is normal—and smart.

### **Prepare in Advance. Preparation leads to better meetings.**

- Review the agenda before the meeting
- Coordinate with presenters ahead of time
- Make sure materials are shared in advance and encourage members to prepare.

Prepared meetings are more focused and respectful of everyone’s time.

#### **Key message**

**Guide process, not outcome**

## **15. Parliamentary Procedure Basics**

### **Purpose of parliamentary procedure**

Parliamentary procedure is a set of rules that help meetings be:

- **Fair**
- **Organized**
- **Efficient**

These rules make sure everyone has a chance to participate and that decisions are made clearly.

### **Using Robert’s Rules**

Most Councils use Robert’s Rules of Order to guide how meetings are run.

## Chair's responsibilities

### Stay Neutral During the Vote

The Chair's primary role is to **lead the process — not influence the outcome.**

- Do not debate while presiding.
- Do not show preference through tone or body language.
- Keep discussion balanced and orderly.

If the Chair wants to debate strongly, they should temporarily pass the gavel to the Vice Chair.

During voting, the Chair must:

1. Stay neutral
2. Restate the motion
3. Call for the vote
4. Determine the result
5. Announce the outcome
6. Ensure accurate recording

The Chair protects fairness and clarity in the decision-making process.

### Does the Chair Vote?

This depends on Council bylaws.

Common models:

- **Votes only to break a tie**
- **Votes as a regular member**
- **Does not vote except when required**

The Chair must follow the Council's bylaws consistently.

## **16. Leading Public Comment**

### **Purpose of public comment**

- Let the public share their opinions, concerns, and suggestions
- Inform the Council about issues that affect people with developmental disabilities

### **Guidelines and time limits**

The Council can create rules to make public comment fair and organized.

Common topics include:

- Total time for the public comment period
- Time limit per speaker
- No giving extra time to someone else
- Expected behavior and standards of conduct
- Follow your state's Open Meeting Law requirements

### **Chair's duties**

#### **1. Explain the Guidelines**

- Review the rules before the public comment period begins
- Provide written or electronic copies if possible

#### **2. Listen, Don't Engage**

- The Chair does not have a discussion with the public
- Council members should avoid speaking during this time
- This is the time for the Council to listen only

#### **3. Thank the Speakers**

- Thank each person for sharing their comments, even if the comment is critical
- Show respect and appreciation for everyone's participation

### **Tips for Chairs**

- Speak clearly and calmly when reviewing guidelines
- Model respectful listening for Council members
- Keep track of time to ensure fairness for all speakers

## **PART 4: Council Roles and Working Relationships**

*Clarifying roles, authority boundaries, and collaboration with staff and the Executive Director*

## 17. Guide to Council Roles & Responsibilities

### Council Chair

**Role: Lead the council, not the organization**

#### What the Chair *does*

- Runs council meetings so they are:
  - On time
  - Focused
  - Fair and respectful
- Sets the meeting agenda **with the Executive Committee and the Director**
- Makes sure everyone has a chance to speak
- Keeps discussions on track and tied to the council's mission
- Represents the council publicly (when needed)
- Acts as the main council contact for the Executive Director
- Helps the council follow its bylaws, policies, and rules

#### What the Chair *does NOT do*

- Does **not** manage staff
- Does **not** make decisions alone
- Does **not** speak for the council without approval
- Does **not** interfere with day-to-day operations

#### **Key Message**

*“The Chair leads the **room**, not the **organization**.”*

## Executive Director

**Role: Run the organization and carry out the council's decisions**

### What the Executive Director *does*

- Manages day-to-day operations
- Hires, supervises, and evaluates staff
- Implements council decisions and policies
- Prepares information that the council needs to make decisions
- Advises the council on risks, options, and best practices
- Manages budgets, programs, and services
- Represents the organization to partners and the public

### What the Executive Director *does NOT do*

- Does **not** vote (unless bylaws say otherwise)
- Does **not** override council decisions
- Does **not** set policy alone
- Does **not** report to individual council members — only to the council as a whole

### Key Message

“The council decides *what*; the Executive Director decides *how*.”

## Council Members

**Role: Support governance, not operations**

### What Council Members Do

Prepare for meetings (read materials ahead of time)

- Ask questions and provide input during meetings
- Support council decisions once they are made
- Follow council policies and codes of conduct
- Communicate respectfully with staff and the public
- Raise concerns through proper channels
- Help connect the council to community needs (if applicable)

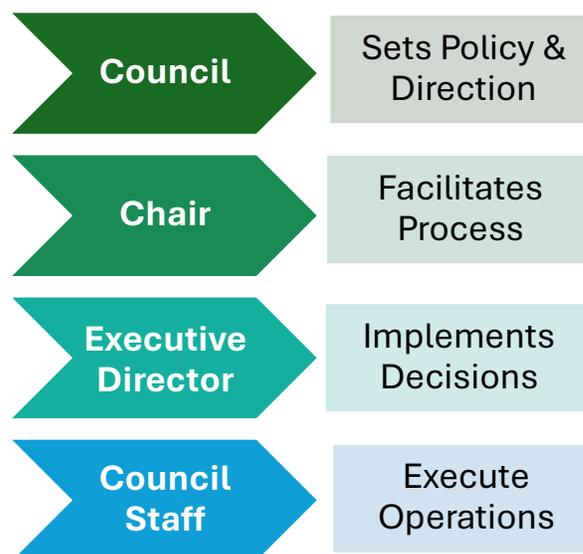
**What they *do NOT* do**

- Do **not** give instructions directly to staff
- Do **not** act independently on behalf of the council
- Do **not** revisit decisions outside of meetings
- Do **not** micromanage programs or employees

**Key Message**

“Council members govern together — not individually.”

**Decision Flow**



### Key Message

- If it's about policy or direction → Council
- If it's about operations or staff → Executive Director

### Common role confusion and who should address

Issue	Who addresses
Staff performance issues	Executive Director
Meeting control	Chair
Program details	Executive Director
Policy changes	Council
Public complaints	Executive Director (with council informed as needed)

### Key Message

- **Chair** → Leads meetings and council process
- **Executive Director** → Runs the organization
- **Council Members/Staff** → Govern responsibly and support decisions

When everyone stays in their lane, trust goes up and stress goes down.

## **18. How Council Staff Support the Council**

### **Professional advice**

- Research issues
- Identify options
- Explain risks and impacts
- Make recommendations

**This helps the Council make informed decisions.**

### **Meeting preparation**

- Draft agendas
- Write reports
- Provide background information
- Record meeting minutes

**This ensures meetings are organized and transparent.**

### **Implementation**

- Develop action plans
- Manage budgets
- Deliver services and projects
- Monitor and report progress

**This turns decisions into action.**

### **Governance support**

- Act impartially
- Follow laws and policies
- Treat all Council members fairly
- Ensure compliance and accountability

## **This builds public trust.**

### **Clear separation between Council and staff**

- Protects good decision-making
- Prevents conflicts
- Strengthens accountability
- Supports effective community outcomes

#### **Key Message**

**Council sets the direction.**

**Staff provide advice and deliver the work.**

## **19. Council Members & Staff: Working Together**

### **Mutual respect**

We treat Council members, staff, the public, and each other with professionalism and courtesy. Respect is the foundation of a successful Council.

### **Trust**

We have confidence in each other's roles and responsibilities. Trust supports strong oversight, open information sharing, and good decision-making.

### **Reciprocal communication**

We provide the help and information people need to do their jobs well. Everyone contributes to success.

### **Shared purpose**

We stay focused on clearly defined goals and the Council's mission. Our work aligns with the State/Territory Plan.

## Shared Efforts

- Work toward the goals in the State/Territory Plan.
- Understand the impact of decisions on people with developmental disabilities and their families.
- Make responsible financial decisions and use Council resources wisely.
- Recruit skilled Council members with a wide range of experiences and perspectives.
- Participate in planning and reflection about the Council's work.
- Ensure everyone participates and no one is left behind.

## Shared outcomes

- Goals and objectives of the State/Territory Plan are achieved.
- The needs of the developmental disability community are clearly understood.
- Council members and staff work in a unified and coordinated way.
- All voices are heard, valued, and included.

### Key Message

Strong Councils are built on respect, trust, communication, shared effort, and inclusion with everyone working together toward meaningful community outcomes.

## 20. Strategies for the Chair to Build a Strong Relationship with the Director

### Purpose

- A strong Chair–Director relationship builds **trust, clarity, and stability**.
- When this relationship works, the whole organization works better.

## Start With Clear Expectations

**Get aligned early — and revisit often**

### What the Chair Should Do

- Talk openly with the Director about:
  - Roles and boundaries
  - Communication style
  - Decision-making authority
- Confirm how success will be measured
- Agree on how and when feedback will be shared

### Simple rule

“No assumptions — say it out loud.”

## Communicate Regularly and Predictably

**No surprises = less stress**

### What the Chair Should Do

- Schedule regular check-ins (weekly or biweekly)
- Use check-ins to:
  - Share council feedback
  - Ask what support is needed
  - Flag emerging issues early
- Be reachable between meetings when needed

### What to avoid

- Only talking when there’s a problem
- Delivering council feedback in an emotional or unclear way

### Simple rule

“If it’s important, don’t wait for the meeting.”

### Be a Partner, not a Boss

#### **The Chair supports — the council supervises**

##### **What the Chair should do**

- Act as a sounding board, not a supervisor
- Ask questions before offering solutions
- Respect the Director’s expertise and judgment
- Help the Director navigate council dynamics

##### **What to avoid**

- Giving operational instructions
- Speaking on behalf of the council without agreement

##### **Simple rule**

“Support without controlling.”

### Back Each Other Up

#### **Unity builds credibility**

##### **What the Chair should do**

- Support the Director in public and in meetings
- Address disagreements privately
- Reinforce council decisions once made
- Protect the Director from mixed messages or individual council member pressure

##### **Simple rule**

“No public surprises.”

## Give Honest, Timely Feedback

### Kind, clear, and consistent

#### What the Chair should do

- Share feedback early — not months later
- Balance concerns with recognition
- Use facts and examples, not opinions
- Frame feedback around goals and outcomes

#### Simple rule

“Feedback is a gift — wrap it well.”

## Respect Boundaries

### Trust grows when roles are honored

#### What the Chair should do

- Direct staff questions to the Director
- Avoid stepping into day-to-day operations
- Encourage other council members to do the same
- Reinforce the Director’s authority with staff

#### Simple rule

“If it’s operational, it’s the Director’s call.”

## Plan Together

### Shared vision = fewer conflicts

#### What the Chair should do

- Work jointly on:
  - Meeting agendas (may involve Executive Committee)
  - Strategic priorities

- Council goals
- Check alignment before major decisions or announcements
- Prepare together for difficult conversations

### **Simple rule**

“Plan together, present together.”

### **Handle Conflict Early and Privately**

#### **Small issues grow if ignored**

#### **What the Chair should do**

- Address tension as soon as it appears
- Ask questions before making assumptions
- Stay focused on the issue, not the person
- Use agreed-upon processes if conflict escalates

### **Simple rule**

“Deal with it early, or deal with it bigger later.”

### **Do a Regular Relationship Check**

#### **Don't assume — ask**

#### **Suggested check-in questions**

- What's working well between us?
- What's getting in the way?
- What support do you need from me?
- Is there anything we should be handling differently?

### **Simple rule**

“Strong relationships are maintained, not assumed.”

### **Bottom Line for the Chair**

- Be clear
- Be consistent
- Be respectful
- Be supportive
- Be honest

“The Chair–Director relationship sets the tone for the entire organization.”

## **PART 5: Legal, Personnel & Accountability Responsibilities**

*High-responsibility governance duties requiring compliance and oversight.*

## 21. Legal Authority: What the DD Act Says

Under the Developmental Disabilities Assistance and Bill of Rights Act (DD Act):

- The **Council has the authority to hire the Director.**
- The Council must follow **all applicable state or territory laws, policies, and procedures.**
- The Council must follow **State personnel rules** if they apply.
- The Council must take action to **employ and advance qualified people with disabilities.**
- The Council should recruit candidates from a **wide range of backgrounds.**
- If a State or Territory does not recognize the Council's authority to hire, the Council should contact its assigned Program Specialist at **OIDD** (Administration for Community Living).

### No Single Required Hiring Method

There is **no single hiring process required by the Administration.**

Two key factors shape how the Council hires:

1. **State or Territory rules, policies, and procedures** that apply to:
  - The Council
  - The Designated State Agency (DSA)
2. **State personnel rules**, if applicable.

The hiring process must follow these rules.

### Memorandum of Understanding (MOU)

The Council should review its **Memorandum of Understanding (MOU)** with the Designated State Agency.

The MOU should clarify:

- The Council's authority to hire the Director

- The role of the Designated State Agency in processing or administering the hire
- Any required personnel or HR procedures
- Fiscal or administrative responsibilities

The Chair should ensure the MOU supports the Council's hiring authority as outlined in the DD Act.

### Interim Leadership Options

If there is a vacancy, the Council may consider:

- **Interim Director**
- **Acting Director**
- **Chief of Staff or senior staff member serving temporarily (this must be okay with the Designated State Agency)**

Any interim arrangement must:

- Follow state and personnel rules
- Be approved by the Council
- Be clearly documented

### The Chair's Role in the Hiring Process

The Chair typically **leads the hiring process on behalf of the Council**, but the full Council makes the final hiring decision.

#### **Step 1: Understand the Rules**

- Identify all applicable **state laws, policies, and personnel procedures**.
- Review requirements in the MOU.
- Consult Human Resources with the Designated State Agency as needed.

#### **Step 2: Review Past Practice**

- Review the Council’s last hiring process.
- Determine what worked well.
- Identify improvements or needed changes.

### **Step 3: Develop and Approve the Hiring Process**

- Outline the full hiring process, including:
  - Recruitment strategy
  - Interview structure
  - Selection process
  - Decision-making method
- Ensure the process:
  - Follows all legal requirements
  - Promotes diversity and disability inclusion
- Present the proposed process to the Council.
- Obtain **formal Council approval**.
- Record approval of the process in official meeting minutes.

### **Step 4: Keep the Council Informed**

- Provide regular updates.
- Share applicant pool information (as allowed by policy).
- Ensure transparency and compliance.

### **Step 5: Lead the Decision-Making Process**

- Facilitate candidate interviews.
- Guide Council discussion.
- Ensure fair and consistent evaluation.
- Lead the Council to a final decision.
- Ensure the final action is formally recorded.

## Key Responsibilities of the Chair

The Chair must:

- Protect the Council's legal authority under the DD Act.
- Ensure compliance with state and personnel rules.
- Promote inclusive recruitment and advancement of people with disabilities.
- Maintain transparency and proper documentation.
- Lead the Council through a fair and lawful hiring decision.

## 22. Annual Evaluation of the Executive Director

### Legal and Administrative Framework

There is **no single evaluation method required by the Administration.**

However, the evaluation process must align with:

1. **State or territory laws, policies, and procedures** that apply to the Council and/or the Designated State Agency (DSA)
2. **State personnel rules**, if applicable

The Chair should also review requirements under the Developmental Disabilities Assistance and Bill of Rights Act (DD Act), which affirms the Council's authority over the Director.

### First Steps for the Chair

- Review your **Council bylaws and policies.**
- Review the **Memorandum of Understanding (MOU)** with the DSA.
- Contact the **DSA Human Resources office** to confirm:
  - Required evaluation forms
  - Required timelines
  - Rules regarding probationary periods

- Any required pay adjustment procedures
- Check your **Council calendar** to align the evaluation with:
  - Fiscal year
  - State-required evaluation deadlines
  - The initial hire date

If your Council does not have a clear evaluation process, use this opportunity to **develop or revise one before conducting the evaluation.**

### The Chair's Role

The Chair is typically responsible for ensuring the **annual evaluation is completed properly and on time.**

The Chair should:

- Ensure the process follows bylaws and state rules.
- Lead or coordinate the evaluation process (unless delegated).
- Ensure fairness and confidentiality.
- Provide a report to the Council confirming the evaluation was completed (recorded in meeting minutes).
- Address performance concerns throughout the year — not just at evaluation time.

**Important:** Do not wait until the annual review to address serious concerns. Ongoing supervision and communication are essential.

## **PART 6: Advocacy, Public Leadership & Compliance**

*Understanding the Chair's role in public leadership, policy education, and ensuring compliance with federal and state rules related to advocacy and lobbying.*

## 23. Legal Foundation

Under the Developmental Disabilities Assistance and Bill of Rights Act (DD Act), State DD Councils are authorized to:

- Engage in **advocacy**
- Support **systems change**
- Educate policymakers and the public
- Promote policies that improve the lives of people with developmental disabilities

However, Councils must comply with **federal and state lobbying restrictions**, including rules tied to federal funding.

## 24. Advocacy vs. Lobbying: What's the Difference?

### ✓ **Advocacy (Allowed)**

Advocacy generally includes:

- Educating policymakers about issues affecting people with developmental disabilities
- Sharing data, research, and personal stories
- Providing information about how policies impact communities
- Meeting with legislators to explain needs and priorities
- Supporting self-advocates and families in understanding policy issues
- Testifying when invited to provide information or expertise

Advocacy focuses on **education and information**.

## 25. ⚠ **Lobbying (Restricted or Prohibited with Federal Funds)**

Lobbying generally includes:

- Urging a legislator to **vote for or against** specific legislation
- Asking others to contact legislators to influence a vote (“call to action”)
- Supporting or opposing a specific bill by name and urging its passage or defeat
- Using federal funds to influence legislation

Direct and grassroots lobbying activities may be restricted or prohibited when using federal DD Council funds.

Always check:

- State laws
- Federal grant conditions
- Your Council’s policies
- Guidance from ACL/OIDD
- Information from ITACC

### The Chair’s Role

The Chair plays a key leadership role in ensuring the Council engages in strong advocacy while avoiding prohibited lobbying.

#### **1. Set Clear Expectations**

- Ensure Council members understand the difference between advocacy and lobbying.
- Reinforce that federal funds cannot be used for prohibited lobbying activities.
- Encourage education-based advocacy.

#### **2. Monitor Public Communications**

The Chair should ensure:

- Council statements are informational, not directive.
- Public materials do not urge specific votes.
- Social media posts do not include calls to action regarding legislation (unless clearly compliant with applicable rules and funding restrictions).

### **3. Guide Legislative Engagement**

When meeting with policymakers:

- ✓ Share data and lived experience
- ✓ Explain the impact of policies
- ✓ Answer questions
- ✗ Do not urge a “yes” or “no” vote if using federal funds
- ✗ Do not organize grassroots pressure campaigns using Council resources

### **4. Separate Personal and Council Roles**

Council members (including the Chair):

- May engage in lobbying **in their personal capacity**
- Must clearly separate personal actions from official Council representation
- Must not use Council resources, title, or federal funds for prohibited lobbying

The Chair should clearly model this distinction.

### **5. Consult When Unsure**

If questions arise:

- Review federal grant terms and conditions
- Check state laws
- Consult the Designated State Agency
- Contact the Council's assigned Program Specialist at OIDD

When in doubt — **pause and seek guidance.**

### Chair's Bottom Line

The Chair must:

- Promote strong, visible advocacy
- Protect the Council's federal funding
- Ensure legal compliance
- Model responsible public leadership
- Maintain public trust

Effective advocacy educates.

Prohibited lobbying directs votes.

## **PART 7: Tools, Checklists & Practical Tips**

*Quick-reference resources, scripts, and leadership tools for daily use.*

## [Quick-Reference: Dos & Don'ts for Communication](#)

### **Dos – Speak and Act Respectfully**

- ✓ Listen carefully and show interest in what others say.
- ✓ Be mindful of persons' **lived experiences**.
- ✓ Use clear and professional language.
- ✓ Think before you speak; choose words carefully.
- ✓ Stay calm and positive in discussions.
- ✓ Represent the Council's values in all communication.

### **Don'ts – Avoid These**

- ✗ Don't use sarcasm, humor, or wordplay that could be misunderstood.
- ✗ Don't use personal slurs or swear words.
- ✗ Don't speak without thinking about the impact of your words.
- ✗ Don't misrepresent the Council or its positions.
- ✗ Don't ignore the perspectives of other members.

### **Tips for Effective Communication**

- Pause before responding if unsure how to phrase something.
- Ask clarifying questions instead of making assumptions.
- Remember: your words reflect on the **entire Council**.
- Be inclusive: ensure all members feel heard and valued.

### **Quick Reminder**

**Lead with respect. Represent the Council thoughtfully. Build trust.**

## Council Chair Role Checklist

Use this checklist to stay organized and focused in the Chair role.

---

### Lead Effective Meetings

- Prepare to guide meetings and discussions
  - Keep meetings on track and on time
  - Encourage respectful discussion
  - Make sure all members have a chance to be heard
- 

### Plan Purposeful Agendas

- Meet or check in with the Executive Director before meetings
  - Help set clear goals for each meeting
  - Review the agenda and materials in advance
  - Ensure time is set aside for key decisions
- 

### Support Director Performance Review

- Understand the Council's performance review process
  - Lead or oversee the Executive Director's annual evaluation
  - Follow Council policies and timelines
  - Focus on goals, performance, and accountability
- 

### Engage and Support Council Members

- Encourage active participation in meetings
- Support committee involvement
- Promote leadership development and training
- Help identify and prepare future leaders (succession planning)

---

 **Guide Strategic Direction**

- Help lead development of the Council’s 5-Year State Plan**
  - Keep the Council focused on long-term goals**
  - Check progress toward plan priorities**
  - Support implementation of the plan**
- 

 **Know the Rules**

- Learn the Council’s bylaws and policies**
  - Understand open meetings and public notice laws**
  - Be familiar with the DD Act**
  - Know how the Council was established in your state or territory**
- 

 **Remember**

- The Chair leads—but does not do everything alone**
- Ask for help, training, or clarification when needed**
- Strong leadership is shared leadership**

## Chair Meeting Tips Checklist

Lead meetings that are fair, respectful, and efficient. Use this checklist to stay on track.

---

### **Serve the Members**

- Lead to support members, not control them
  - Think: *“How can I help members do their best work?”*
- 

### **Recognize Speakers**

- Ask members to raise hands before speaking
  - Let everyone speak once before anyone speaks a second time
  - Ensure all voices are heard
- 

### **Keep Discussion Focused**

- Discussion = staying on the issue, not chatting
  - Redirect politely if conversation strays
  - Keep everyone on topic
- 

### **Listen Carefully**

- Give each speaker your full attention
  - Treat every comment as important
  - Make members feel heard and understood
- 

### **Model Courtesy and Respect**

- Speak respectfully and expect the same from members
  - Handle disagreements calmly
  - Encourage constructive feedback
- 

### **Stay Focused on Meeting Purpose**

- Remind members of the agenda and meeting goals
  - Keep discussion relevant to the issue at hand
  - Guide the group toward decisions efficiently
- 

### **Build Positive Connections**

- Encourage member participation
  - Recognize contributions and ideas
  - Maintain supportive, professional relationships
- 

### **When in Doubt**

- Ask the Council if unsure about procedure, decisions, or next steps
  - Collaboration keeps meetings fair and effective
- 

**Tip:** Keep this checklist handy during meetings—it's your quick reference for running fair, productive meetings!

## Council Chair Script Cheat Sheet: What to Say During Meetings

### Open the Meeting

- “I call this meeting to order.”
- “Thank you all for being here today.”
- “We have a quorum, so we can conduct business.”

### Follow the Agenda

- “The next item on our agenda is \_\_\_\_.”
- “We’re now moving to agenda item number \_\_\_\_.”
- “Let’s stay with this item before moving on.”

### Recognize Speakers

- “I recognize \_\_\_\_ to speak.”
- “Please raise your hand if you would like to speak.”
- “Let’s hear from someone who hasn’t spoken yet.”

### Introduce a Motion

- “Is there a motion?”
- “Thank you. Is there a second?”
- “The motion before us is \_\_\_\_.”

### Keep Discussion on Track

- “Please speak to the motion on the floor.”
- “Let’s bring the discussion back to the motion.”
- “That’s important, but it’s outside this item.”

### **Maintain Order and Respect**

- “Let’s speak one at a time.”
- “Please direct comments to the Chair.”
- “Let’s keep the discussion respectful and focused.”

### **Close Discussion**

- “Is there any further discussion?”
- “Seeing none, we will move to a vote.”

### **Take a Vote**

- “All those in favor, say ‘yes.’”
- “All those opposed, say ‘no.’”
- “Any abstentions?”

### **Announce the Result**

- “The motion passes.”
- “The motion does not pass.”
- “The motion passes unanimously.”

 Transition to Next Item

- “Thank you. We will now move to the next agenda item.”

 Chair Reminder

You don't need perfect words.

Clear, calm, and consistent language is enough.

## Meeting Facilitation Guide: Sample Chair Phrases

### Opening the Meeting

- “Welcome, everyone. Thank you for being here.”
  - “Today we’ll focus on a few key items that move our work forward.”
  - “Let’s remember to listen respectfully and value each other’s experiences.”
- 

### Setting Expectations

- “Our goal is to hear from everyone and stay focused on the agenda.”
  - “Let’s keep our comments brief so all voices can be heard.”
  - “If we get off track, I may bring us back to the topic.”
- 

### Encouraging Participation

- “We haven’t heard from everyone yet — would anyone like to add to this?”
  - “I’d like to invite members who haven’t spoken to share their thoughts.”
  - “Does anyone have a different perspective we should consider?”
  - “Thank you for sharing your lived experience — that’s important.”
- 

### Clarifying Discussion

- “Let me check that I understand what’s being said.”
- “Can someone explain that in another way?”
- “How does this connect to our goals or the State Plan?”

## **Keeping the Meeting on Track**

- “That’s an important point. Let’s bring it back to today’s agenda item.”
  - “I want to be mindful of time — let’s focus on the key issue.”
  - “We may need to park that topic and come back to it later.”
- 

## **Supporting Decision-Making**

- “At this point, we need to decide on our next step.”
  - “The decision before us is...”
  - “Is everyone clear on what we’re being asked to decide?”
  - “Do we have enough information to move forward?”
- 

## **Managing Disagreement**

- “It’s okay to have different opinions.”
  - “Let’s focus on the issue, not the person.”
  - “I appreciate hearing different viewpoints — that helps us make better decisions.”
  - “Let’s slow down and make sure everyone feels heard.”
- 

## **Addressing Challenging Moments**

- “Let’s pause for a moment.”
- “I want to remind us of our shared values.”
- “Let’s reframe this in a way that keeps the conversation respectful.”
- “I’m going to step in to help us move forward.”

## **Closing Discussion**

- “Let me summarize what I’m hearing.”
  - “Here’s what we’ve agreed on so far.”
  - “Are there any final thoughts before we move on?”
- 

## **Closing the Meeting**

- “Thank you all for your time and thoughtful input.”
  - “Your participation helps move this work forward.”
  - “We’ll follow up on next steps after the meeting.”
- 

## **Chair Reminder**

- ✓ You don’t have to say it perfectly — just clearly
- ✓ Calm, respectful language sets the tone
- ✓ Your words help keep the Council focused on progress

## **Sample Chair Phrases for Virtual/Hybrid Meetings**

### **Starting the Meeting**

- “Welcome, everyone, whether you’re here in person or online.”
  - “Let’s do a quick check that everyone can hear and see the screen.”
  - “Please use the chat or ‘raise hand’ feature if you want to speak.”
- 

### **Encouraging Participation**

- “I see some hands raised — let’s go in order so everyone gets a chance.”
  - “If you’re on mute, please unmute to share your thoughts.”
  - “For those online, please type your questions in the chat if you don’t want to speak.”
- 

### **Keeping the Meeting on Track**

- “Let’s pause and make sure online participants can follow along.”
  - “I’m going to summarize so everyone knows where we are.”
  - “If you’re having technical issues, please let us know in the chat.”
- 

### **Supporting Discussion and Decisions**

- “Can someone online share their perspective?”
  - “Let’s check in with those on the call before moving to a vote.”
  - “Please use the chat to confirm agreement if you can’t speak.”
- 

### **Managing Disagreement**

- “Let’s be mindful of online communication — tone can be misunderstood.”
  - “Please keep comments brief so we can hear from everyone.”
  - “We’ll take turns speaking to make sure everyone has space to contribute.”
- 

### **Closing the Meeting**

- “Thank you to everyone who joined virtually and in person.”
  - “We’ll send the meeting notes and next steps to everyone, including online participants.”
  - “If you have follow-up questions, please email or use the chat — we want to hear from everyone.”
- 

### **Quick Virtual Chair Reminders**

- ✓ Keep checking in with online participants
- ✓ Repeat key points for clarity
- ✓ Use chat and hand-raising features to manage turn-taking
- ✓ Be patient — technical issues happen

## **Parliamentary Procedure: Sample Chair Language: What to Actually Say**

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### **Introduce Business in Order**

**Follow the agenda and open items clearly.**

**Chair might say:**

- “The next item on our agenda is \_\_\_\_.”
  - “We are now moving to agenda item number \_\_\_\_.”
  - “Let’s focus on this item before moving on.”
- 

### **Recognize Speakers**

**Manage who speaks and when.**

**Chair might say:**

- “I recognize \_\_\_\_ to speak.”
  - “Please raise your hand if you would like to speak.”
  - “Let’s hear from someone who hasn’t spoken yet.”
- 

### **Ensure Motions Are in Order**

**Make sure motions are clear before discussion.**

**Chair might say:**

- “I hear a motion. Could you please restate it clearly?”
  - “Is there a second to the motion?”
  - “The motion before us is \_\_\_\_.”
-

## **Keep Discussion Focused on the Motion**

**Gently redirect when discussion goes off track.**

**Chair might say:**

- “Let’s bring the discussion back to the motion on the floor.”
  - “That’s an important point, but it’s outside this motion.”
  - “Please speak to the motion we are discussing.”
- 

## **Maintain Order**

**Keep the meeting respectful and fair.**

**Chair might say:**

- “Let’s remember to speak one at a time.”
  - “Please direct comments to the Chair.”
  - “Let’s keep our discussion respectful.”
- 

## **Put Motions to a Vote**

**Close discussion and move to a decision.**

**Chair might say:**

- “Is there any further discussion?”
  - “Seeing none, we will move to a vote.”
  - “All those in favor, say ‘yes.’”
  - “All those opposed, say ‘no.’”
- 

## **Announce Results**

**State decisions clearly for the record.**

**Chair might say:**

- “The motion passes.”
  - “The motion does not pass.”
  - “The motion passes unanimously.”
- 

### **Chair Reminder**

You do not need perfect words.

Clear, calm, and consistent language builds confidence and trust.

## Chair Public Comment Cheat Sheet & Script

Lead fair, respectful, and organized public comment periods. Use this as a quick reference during meetings.

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### When Public Comment Happens

- Scheduled before, during, or after the Council meeting
  - Announced in advance
- 

### Purpose

- Let the public share opinions, concerns, or suggestions
  - Inform the Council about issues affecting people with developmental disabilities
- 

### Guidelines to Share

- Total length of public comment period
  - Time limit per speaker
  - No transferring time to another speaker
  - Expected behavior / conduct
  - Follow Open Meeting Law requirements
- 

### Chair Duties + What to Say

#### 1. Opening the Public Comment Period

- “We will now begin the public comment period.”
- “This is a time for members of the public to share their views with the Council.”

- “Please follow the guidelines. Each speaker has \_\_\_ minutes.”

## 2. Explain Guidelines

- “Please speak one at a time and keep your comments within the time limit.”
- “You may not give your time to another speaker.”
- “We ask that everyone remain respectful during comments.”
- “Council members will listen but not respond during this time.”

## 3. During Public Comment

- “Thank you for your comment.”
- “We appreciate you sharing your perspective.”
- “We hear your concern and will take it into consideration.”
- *(If discussion starts)* “Please remember, this time is for public comments only. Council members will not respond during this period.”

## 4. Closing the Public Comment Period

- “Thank you to everyone who shared their comments today.”
- “The public comment period is now closed.”
- “We appreciate your input and will consider it as we continue our work.”

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### Tips for Chairs

- Speak calmly and clearly
- Repeat guidelines at the start if needed
- Model respectful listening for the Council
- Keep the session on schedule
- Thank every speaker, positive or negative.

## Council Succession Planning Timeline

### Why a Timeline Matters

- Makes planning predictable and organized
- Gives members time to prepare for leadership roles
- Reduces stress from unexpected departures
- Builds a strong pipeline of future leaders

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### Sample Timeline for Succession Planning

<b>Time Before Term Ends</b>	<b>Task</b>	<b>Chair's Role</b>	<b>Notes</b>
<b>12–18 months</b>	Identify upcoming leadership vacancies	Review terms and expected departures	Begin thinking about skills needed in future leaders
<b>9–12 months</b>	Assess current Council strengths & gaps	Talk to members about skills, interests, and development needs	Document findings
<b>6–9 months</b>	Develop leadership plan	Decide which members could step into leadership roles	Include mentoring or training plans
<b>3–6 months</b>	Recruit & prepare candidates	Invite members to take on leadership responsibilities	Provide support and shadowing opportunities
<b>1–3 months</b>	Confirm transitions	Announce incoming leaders	Ensure outgoing leaders share

			knowledge and resources
<b>After transition</b>	Review & adjust	Evaluate how well the transition went	Update succession planning process for next cycle

**Chair’s Key Responsibilities on the Timeline**

- **Plan early:** Start succession planning well before terms end
- **Support members:** Help them develop leadership skills
- **Mentor and guide:** Offer learning opportunities or shadowing
- **Communicate clearly:** Keep the Council informed about timelines and transitions
- **Document lessons learned:** Improve the process for the future

**Tips for Success**

- Start planning **at least a year in advance**
- Include **mentoring and skill-building** for potential leaders
- Keep the process **transparent and fair**
- Adjust the timeline if a leader leaves unexpectedly

## **Plain-Language Scripts for Difficult Conversations**

### **1. Starting a Difficult Conversation**

**Purpose:** Set a respectful tone and reduce defensiveness.

#### **Chair Script**

“Thank you for meeting with me. I want to talk about something important, and my goal is to support you and the Council.”

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### **2. When a Member Is Struggling or Overwhelmed**

**Purpose:** Show care and offer support.

#### **Chair Scripts**

“I’ve noticed it’s been harder for you to attend or participate lately. I wanted to check in and see how things are going.”

“Is there anything getting in the way of your participation that we could help with?”

“We value your involvement, and I want to make sure you have what you need to continue.”

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### **3. When Expectations Are Not Being Met**

**Purpose:** Be clear without blaming.

#### **Chair Scripts**

“I want to talk about our expectations for Council members.”

“Part of serving on the Council includes [attending meetings / preparing in advance / respectful participation]. Right now, that’s not happening consistently.”

“Let’s talk about what might help improve this.”

---

#### **4. When Addressing Conduct or Behavior Issues**

**Purpose:** Address the issue early and respectfully.

##### **Chair Scripts**

“I want to raise a concern about something that happened at the last meeting.”

“During the discussion, some comments came across as dismissive, and that made it harder for others to participate.”

“Our expectation is that everyone is treated with respect. How can we work together to improve this going forward?”

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#### **5. When a Member Is Dominating Discussions**

**Purpose:** Balance participation without shaming.

##### **Chair Scripts**

“You bring valuable ideas, and I appreciate your engagement.”

“I also need to make sure everyone has space to contribute.”

“I may step in during meetings to invite others to speak, and I appreciate your understanding.”

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#### **6. When a Member Is Disengaged or Quiet**

**Purpose:** Invite participation without pressure.

##### **Chair Scripts**

“I’ve noticed you haven’t had many chances to share lately.”

“I want you to know your input is welcome, in whatever way works best for you.”

“If there’s a different way you’d like to participate, let me know.”

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## **7. When a Member Disagrees Strongly With the Group**

**Purpose:** Validate while protecting group process.

### **Chair Scripts**

“I hear that you have strong concerns, and it’s important those are acknowledged.”

“At the same time, the Council needs to move forward together.”

“What would help you feel able to live with this decision?”

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## **8. When a Conversation Needs to Be Redirected**

**Purpose:** Keep meetings productive.

### **Chair Scripts**

“I’m going to pause us here so we can stay focused on the decision.”

“That’s an important issue, but it’s outside today’s agenda.”

“Let’s note this and come back to it later.”

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## **9. When Change Does Not Happen**

**Purpose:** Be honest and clear about next steps.

### **Chair Scripts**

“We’ve talked about this before, and I haven’t seen the change we discussed.”

“This is important for the Council to function well.”

“Let’s talk about next steps and what needs to happen going forward.”

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## **10. Closing a Difficult Conversation**

**Purpose:** Preserve dignity and relationship.

### **Chair Scripts**

“Thank you for having this conversation with me.”

“I appreciate your willingness to talk openly.”

“Please reach out if you have questions or need support.”

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### **Key Reminder for Chairs**

- Be clear, calm, and respectful
- Address issues early
- Focus on behavior, not personality
- Support first, accountability always

## **DD Council Chair Quick Checklist Annual Executive Director Evaluation**

### **✓ BEFORE YOU BEGIN**

- Review Council bylaws and personnel policies
  - Review the Memorandum of Understanding (MOU) with the DSA
  - Confirm required evaluation forms with DSA HR
  - Confirm required timelines (annual date, fiscal year, probation deadlines)
  - Verify compensation procedures (if applicable)
  - Check if the ED is in a probationary period and confirm deadlines
- 

### **✓ PREPARE THE PROCESS**

- Review ED job description
  - Review Council mission, vision, and annual goals
  - Review prior-year ED performance goals
  - Set evaluation timeline (survey distribution, due dates, discussion date)
  - Inform Council members about:
    - Who participates
    - Confidentiality/anonymity
    - Deadlines
    - Purpose of the evaluation
  - Ensure Council staff will NOT compile responses
  - Arrange for tabulation by:
    - DSA HR, or
    - External consultant
- 

### **✓ CONDUCT THE EVALUATION**

- Distribute evaluation forms or survey
  - Send reminders before deadline
  - Collect completed responses
  - Ensure anonymity/confidentiality
  - Prepare summary report of:
    - Ratings
    - Themes
    - Strengths
    - Areas for improvement
- 

#### **✓ REVIEW WITH THE COUNCIL**

- Discuss results in Executive Session (as allowed by Open Meeting Law)
  - Identify key strengths
  - Identify priority improvement areas
  - Determine if compensation adjustment is appropriate (follow state rules)
  - Agree on key messages for the ED
  - Record in meeting minutes that the evaluation was completed
- 

#### **✓ MEET WITH THE ED**

- Schedule meeting (Chair + designated representatives if required)
- Share summary results
- Discuss:
  - Strengths to build on
  - Areas needing improvement
  - Top priorities for the coming year
  - Professional development goals

- Develop written goals or action steps
  - Establish follow-up timeline
- 

### **✓ IF PERFORMANCE CONCERNS EXIST**

- Clearly document concerns
- Develop written improvement plan
- Set measurable expectations and deadlines
- Consult DSA HR immediately if serious issues arise
- Follow state personnel rules carefully

Do not wait until the next annual evaluation to address major concerns.

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### **✓ AFTER COMPLETION**

- Provide Chair report confirming evaluation completion
  - Ensure documentation is filed appropriately
  - Calendar next year's evaluation date
  - Schedule periodic check-ins with the ED during the year
- 

### **Chair Reminder**

Evaluation is not just a form — it is:

- Oversight
- Accountability
- Leadership
- Support for professional growth

Stay current on performance throughout the year.

Address issues early.

Keep the process fair, documented, and compliant.

## Sample Scripts for Meeting with Legislators

### DD Council Chair Guidance

Legal foundation: Under the Developmental Disabilities Assistance and Bill of Rights Act (DD Act), DD Councils are authorized to engage in advocacy and systems change activities, while following restrictions on lobbying.

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#### 1. Opening the Meeting

**Purpose: Introduce the Council and frame the conversation as informational.**

Thank you for meeting with us today. I serve as Chair of the State Developmental Disabilities Council. Our Council is authorized under the DD Act to promote systems change and improve services for people with developmental disabilities and their families.

We're here to share information about the needs we are seeing across the state and how current policies are impacting individuals and families.

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#### 2. Explaining an Issue (Education-Focused)

**Purpose: Share facts and impact without directing a vote.**

Across our state, individuals with developmental disabilities are experiencing long wait times for services. Families are reporting delays of several years.

Our Council has gathered data showing that these delays affect employment opportunities, housing stability, and caregiver health.

We wanted to share this information with you so you can understand how this issue is affecting your constituents.

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### **3. When a Specific Bill Is Mentioned**

#### **If the legislator brings up a bill:**

We are aware of that legislation. Our role is to provide information about how proposals may affect people with developmental disabilities.

Based on our review, the proposal could impact service access in the following ways...

*(Provide neutral, factual explanation. Avoid saying “please vote yes/no.”)*

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### **4. Responding to “Do You Support This Bill?”**

If asked directly:

Our Council’s role is to provide education and information. We focus on how policies impact individuals with developmental disabilities and their families.

What we can share is how this proposal may affect services and outcomes in your district.

*(If your Council has taken a formal position consistent with legal guidance, state it factually without urging a vote.)*

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### **5. Sharing a Personal Story (Powerful but Compliant)**

With your permission, I’d like to share an example.

A family in your district has been waiting three years for community-based services. During that time, a parent had to leave the workforce to provide full-time care.

This illustrates how service delays can affect employment, income, and overall family stability.

Stories educate. They do not need to include a call to action.

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## **6. Closing the Meeting**

### **Keep the close informational.**

Thank you for taking the time to learn more about the needs of people with developmental disabilities in your district.

We are always available to provide data, connect you with constituents, or serve as a resource as disability-related issues arise.

---

## **7. What NOT to Say (When Using Federal Funds)**

Avoid statements like:

- “Please vote yes on Bill 123.”
- “We urge you to oppose this legislation.”
- “Call your colleagues and ask them to support this bill.”
- “We need you to commit to voting against this.”

These statements may constitute lobbying depending on context and funding source.

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## **8. If Speaking in a Personal Capacity**

If you choose to lobby on your own time:

I want to clarify that I am speaking in my personal capacity, not on behalf of the DD Council.

Do not use:

- Council letterhead
- Council staff time
- Federal funds

- Your official title in a way that implies Council endorsement
- 

### **Chair's Key Reminder**

Advocacy = Educating policymakers about impact.

Lobbying = Urging action on specific legislation.

When unsure:

- Pause.
- Check grant conditions and state rules.
- Consult your Designated State Agency or OIDD Program Specialist.

## DD Council Chair Quick Guide: Advocacy vs. Lobbying

Legal foundation: Under the Developmental Disabilities Assistance and Bill of Rights Act (DD Act), DD Councils are authorized to engage in advocacy and systems change activities. However, federal and state rules restrict certain lobbying activities, especially when using federal funds.

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<b>ADVOCACY (Allowed)</b>	<b>LOBBYING (Restricted/Prohibited with Federal Funds)</b>
<b>Educating policymakers about issues affecting people with developmental disabilities</b>	Urging a legislator to vote <b>for or against</b> specific legislation
<b>Sharing research, data, and outcome information</b>	Asking others to contact legislators to influence a specific bill (“call to action”)
<b>Explaining how policies impact constituents</b>	Supporting or opposing a bill by name and urging its passage or defeat
<b>Providing neutral analysis of proposed legislation</b>	Using federal funds to influence pending legislation
<b>Meeting with legislators to discuss community needs</b>	Organizing grassroots campaigns to pressure lawmakers
<b>Testifying when invited to share expertise or information</b>	Sending communications that say “Vote yes on...” or “Vote no on...”

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### Key Differences

#### Advocacy

- Focuses on **education and information**
- Explains impact
- Shares lived experience
- Builds relationships

- Supports systems change through knowledge

## **Lobbying**

- Focuses on **influencing a specific legislative vote**
  - Includes direct requests for passage or defeat of legislation
  - May include grassroots pressure efforts
- 

## **Examples**

### **✓ Advocacy Example**

“Families in our state are waiting an average of three years for services. This delay affects employment and housing stability.”

### **⚠ Lobbying Example**

“Please vote yes on HB 245 to increase funding.”

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## **Chair Responsibilities**

The Chair should:

- Ensure Council members understand the difference.
  - Monitor public statements and materials.
  - Prevent use of federal funds for prohibited lobbying.
  - Encourage strong, informed advocacy.
  - Clarify when someone is speaking in a personal capacity versus as a Council representative.
- 

## **When Unsure**

Before taking action, ask:

- Are we urging a vote?
- Are we naming specific legislation and asking for passage or defeat?
- Are federal funds or Council resources being used?
- Have we checked state and grant requirements?

If unsure — pause and consult your Designated State Agency or OIDD Program Specialist.