# SPARK
## POLICY INSTITUTE
igniting public policy and community change

# Family & Youth Involvement

## A Workbook for Policy & Governance Boards and Planning Groups

*Tips and Tools for:*

- Preparing for family and youth involvement on a policymaking or governance board
- Recruiting and retaining families and youth on a board
- Gathering family and youth input outside of board meetings

With sample forms and other materials available at:
http://sparkpolicy.com/fiscalfam_youth.htm

**Prepared for Colorado LINKS for Mental Health, 2009 by Spark Policy Institute**

Colorado LINKS for Mental Health is a statewide initiative that has, from 2005 - 2009, focused on <u>promoting partnerships</u> among state agencies and key stakeholder groups by weaving together existing efforts to create a more coordinated continuum of behavioral health services for Colorado children, youth, and families.

For more information about the Initiative, please contact José Esquibel at <u>j.esquibel@state.co.us</u> or 303-692-2421 or visit the Initiative's website at <u>http://www.sparkpolicy.com</u>

**Also available at:**

<u>http://sparkpolicy.com/fiscalfam_youth.htm</u>
**including assessment tools, sample forms, and more!**

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Assessment tools, sample forms, and more available at:
http://sparkpolicy.com/fiscalfam_youth.htm
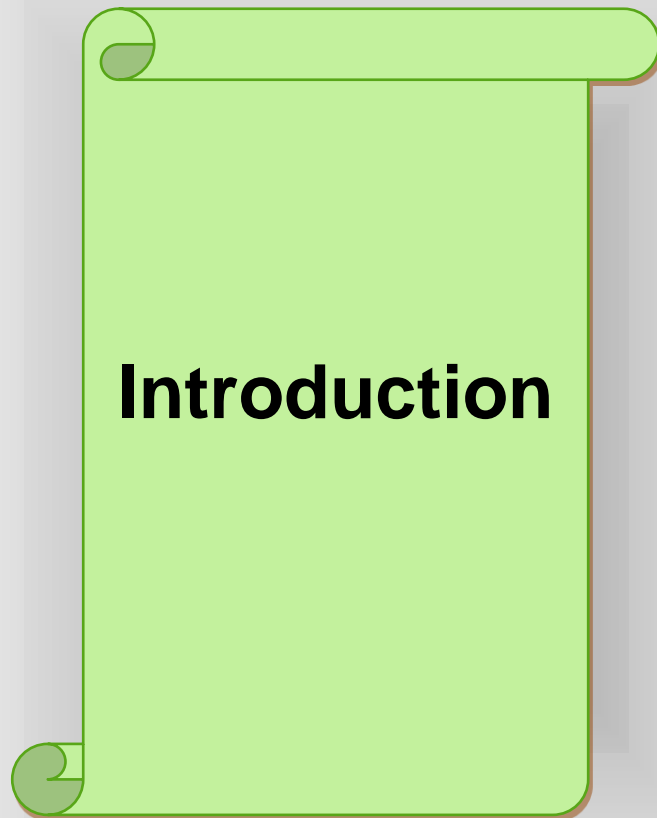
# Introduction

# INTRODUCTION

> **Congratulations!  By reading this workbook you are taking an important first step towards increasing the engagement of families and youth.  Your policymaking and governance will benefit from this critical work.**

Welcome to a self-assessment and user friendly workbook prepared by the Colorado LINKS for Mental Health's Leadership Team on Family Youth Involvement in Policymaking and the Grant Implementation Group.  The workbook is a response both to boards and to families sharing their need for training and information not only for family and youth participants on boards, but also for boards who wish to expand their knowledge of how to engage new members of their boards.

The goal of the workbook is to help boards involved in policymaking, governance of behavioral health and related systems to embrace family and consumer representatives on your board.  The workbook is designed to be succinct and practical, with overviews, discussion guides and checklists, with sample bylaws, reimbursement forms, and other materials.

This workbook includes sections on a broad array of topics, including:
- Section 1: Structuring Meetings to be Family and Youth Friendly
- Section 2: Compensation and Reimbursement
- Section 3: Marketing and Recruitment
- Section 4: Youth Participation
- Section 5: Leadership Development for Youth and Families
- Section 6: Culturally Competent Boards
- Section 7: Privacy and Confidentiality
- Section 8: Evaluation Strategies for Family and Youth Involvement
- Section 9: Beyond Meeting Participation

**Your board decides where to start based on your level of readiness and need.  Ready, set…Go!**

## *Why Family and Youth Participation is Important*

There are many different kinds of boards. While some boards may have fiduciary responsibilities (non-profits, for example), other boards may focus on policy. Policymaking boards are largely composed of professionals, many who have leadership

roles in state and local government. They have a rich breadth of knowledge on policy issues and a commitment to improving systems. Their recognition comes from their agencies as well as the array of partners who work with them on a daily basis.

It is important to clarify the scope of responsibility of your board with any new member, particularly for youth and family members. To be clear, it is not typical for boards to address day-to-day operations, but they do provide oversight. This clarity for any new board member may help to avoid potential frustration in role and scope of their input and participation.

> *"The system building process that fails to develop meaningful partnership with the constituency that will depend upon the system is inherently suspect and limited in its capacity to build an effective system. Meaningful partnerships with families and youth require concerted attention, dedicated resources, and capacity building across all parties"*
> *Sheila Pires, 2002*

Families and youth bring another perspective that other board members do not have: their lived experiences as beneficiaries of services and systems. As consumers of services, they will know the barriers and benefits first hand. Since policy-focused boards are more likely to inspire conversations that are relevant to experiential knowledge, consumers will be better able to participate (Newberry, 2004).

Colorado is joining many other states that have consumers, family members, and youth on policy boards; state planning entities, local governance boards, and agency boards. This very exciting movement brings great opportunity for change.

The valuable contribution of new representation will naturally generate more family friendly and culturally responsive policies and practices. Policies will inevitably be more aligned to meet the needs of the service population and the community and board structure may be more flexible to accommodate new local partners.

## *Is it Time to Develop Family and Youth Leadership on Your Board?*

Now is the time to engage in a discussion with your board! An attachment accompanying this introduction, called "Board Self-Assessment" (available on the website at http://sparkpolicy.com/fiscalfam_youth.htm) has questions for your board to ask about their readiness to engage families and youth and the steps they need to take first, including:

- How does your board value the contributions of families and youth at meetings?
- Is your board ready to be flexible and change the status quo of how it has always held meetings, prepared and disseminated information, and made decisions?

- How will you know whether your board is ready to open the doors and accept uncomfortable, but enlightening conversations that can change how business is done?
- Who among you are the emerging leaders with the passion to lead your board's next development phase?

Family and youth involvement in policymaking, governance, and agency oversight will make a difference. Like other issues, it will take enthusiasm and leadership to see the work through. But your board will only sustain this important participation if the board is ready to make a commitment!

## *Family and Youth Involvement in Colorado*

Cross system committees, task forces, and councils in Colorado vary widely in their engagement of consumer, family, and youth voices.

At the policy level, many of Colorado's systems do involve family and youth representation, but state and local boards vary greatly in their level of involvement, creating the potential for state policy to be made without sufficient consumer input. Without a state or federal statutory mandate, few systems voluntarily engage the consumer, family, or youth voice. (Behavioral Health Task Force Report, 2008).

Yet, the complex problems we have in our communities require many perspectives and people who are willing and able to lend an active hand and work together to solve them. Families understand and have experienced the barriers and can help identify potential solutions to complex problems (Community Toolbox, 2007). Not only are families important partners in Colorado, they are also ready to be partners!

Continuous quality improvement efforts over the past decade in Colorado:

- Family members, consumers, and youth in our state have been exposed to leadership and advocacy training that has been made available thought grants and efforts from system of care, wrap-around, and family to family projects (among others). Specific examples include the Leadership Training Institute through Project Bloom and the Parent-Professional Partnership from the Federation of Families for Children's Mental Health.
- Best practice and evidenced based approaches have trained family partners as 'parent-partners' (wraparound), as 'family support partner' (family to family).
- Colorado was chosen in a competitive bid to send a delegation of leaders to the first ever policy academy on family-driven services; a clear recognition of

> Colorado's leading steps on engaging the family voice in all levels of government.
> - An increased number of policy boards and state and local government committees with family, youth and / or consumer involvement.
> - An increased number of families in advocacy roles in local systems.
> - Legislation recognizing the benefit of family, youth and / or consumer involvement. Do we have specific legislation identified?

Many of the family members and youth who will have an interest in your board may have participated on previous boards or advocacy activities. Expect and plan for great variability in their experiences, everything from no experience at all to observing to participating as a decision-maker, testifying at the legislature, or advocating directly for another family or youth.

Despite being a common principle across sectors, adding this constituent group to a board has at times been met with resistance and challenge in Colorado. Change is hard at all levels. A mere seat at the table is long way from meaningful involvement (Valentine & Capponi, 1989). Families and consumers taking an active part of developing policies and principles of an agency where they were once consumers primarily require relationship building.

In addition, once a family or consumer representative is on the board, they may feel like a token, isolated and not truly included in the board process. To overcome these and many other barriers, this workbook has clear, concise steps for your board to take to ensure authentic family and youth involvement is achieved!

## *Understanding Family and Youth Involvement for Your Board*

When discussing the importance of family and youth participation, it can be easy to argue for why it is not important or appropriate. Below are a list of the common justifications for why family and youth participation is not appropriate and explanations of why these justifications are problematic.

## Common Misconceptions about Family and Youth Involvement

**Justification 1:** The topics addressed by the board are too complex or require too much specialized knowledge for a family member or youth to participate.

*Even the most complex topic is ultimately intended to have a direct or indirect affect on how families and youth experience the system and services. For example, a board exploring privacy laws as they develop a consent form would benefit from family and youth input on how to explain privacy in an accessible, accurate way to families. A board developing continuing education requirements for staff would benefit from family and youth input on their experiences with staff having out of date or irrelevant information, instead of current and helpful information from recently completed trainings.*

**Justification 2:** The board members are also consumers (e.g. of general healthcare services), and thus can represent both their agency and the consumer perspective.

*While the board members may have some experiences with the system, their perspective is still limited to that of someone with extensive knowledge of the system. The perspective that a family or youth brings who is not informed about the system by working in it will be very different. Also, it hard to balance bringing a professional and a consumer perspective to the table at the same time.*

**Justification 3:** The board members work directly with consumers, and thus can bring the consumer perspective to the table based on their experiences with consumers or the system.

*Board members may learn a lot about the consumer experience from what their own clients tell them. However, there is a significant advantage to having direct experience at the board meeting instead of only second hand stories. For example, an issue may arise that never occurred to a board member to ask clients about, but a family or youth participant can draw on their own experience to contribute to the conversation.*

**Justification 4:** Boards must ask family members to excuse themselves so they do not hear confidential discussions during the meeting.

*Privacy standards are addressed here to put to rest any legal fears related to confidentiality concerns at board meetings. Policy and governance boards will not typically focus on specific cases but may globally discuss case related issues. Either way, privacy and confidentiality can be maintained while family members on your board remain in the room for the discussion.*

**Justification 5:** Boards are not able to find, train and sustain investment from family members on their committees.

*This workbook will offer worksheets, tips, tools and additional training references to help identify locations for possible recruits to your board, tips for recruitment, enhanced board flexibility suggestions and leadership development techniques including specific ways in which to better engage and cultivate family leaders.*

**Justification 6:** Boards are resistant to bringing families on at this time. There just isn't anything we can do.

*Alternative ways to bring the family and youth voice to your table are discussed in the workbook. Since there are numerous ways in which to include this essential perspective in system building and policy discussions, there is no excuse to leave consumers out of the dialogue. Self-assessments and discussion questions might help you identify the resistance.*

## *Typical Challenges and Strategies to Overcome*

Typical barriers that families have expressed when discussing their experiences on boards include (Valentine & Capponi, 1989):

- 'Tokenism' - being the lone family voice on a board or committee;
- Consumer / family members not given time to state their concerns or issues;
- Lack of financial reimbursement for their time;
- Reimbursement that negatively impacts public assistance benefits;
- Childcare considerations and unwillingness for a board to recognize the difficulty to access care providers for special needs children
- Inflexibility on part of the board to accommodate time or meeting location to the schedules of family and youth participants;
- Joining an established group with norms and acronyms that make it very difficult to feel included as a partner; and
- Stigma related to sharing their 'stories' when no one else does.

All of these issues are relevant as we move forward as a state to identify an infrastructure for family involvement at the policy level. The following chapters will suggest tactics and tools to minimize or avoid these barriers.

*Tokenism:* Families involved in the creation of this workbook, as part of the Family and Youth Involvement Committee of the LINKS Initiative, as well as many other sources have shared the following to eliminate the barrier of tokenism:

- Recruit in partners – they can attend together or tag-team, but they will have each other to process and use for support. This is establishing an internal buddy system;
- Reach beyond the board for feedback and input. The family members can take information presented at the board to family groups to vet and offer additional insight;
- Make sure the input is acknowledged - arrange for full participation on the board/committee, inclusive of voting privileges. (Ensure that their input is accurately reflected and recorded in the meeting minutes.)
- Advocate for 50% consumer/family participation, or another mix that would offer significant family and youth input;
- Deal honestly with the issues of stigma; and
- No "Alphabet Soup". Eliminate jargon. People get lost quickly if you use acronym short cuts. If you must use a familiar letter abbreviation, take time each time there is a new person at the meeting, to ask if everyone understands what the letters mean. (Stevens and Ibañez, 2004)

## *Planning Your Next Steps*

Your board members bring different capacities for participation with respect to information, knowledge, skills and experience.  While training is important for new board members, this workbook promotes board self-evaluation and training for both new and long-time board members. The goal is to better prepare your board for family, youth, and/or consumer engagement though practices and strategies, to maximize family involvement and role satisfaction.

The worksheets in this workbook have been taken from multiple resources with an eye toward specific use for Colorado policy boards and committees.  We share a rich culture in Colorado of innovation and drive. Our families are strong and want boards to walk the talk and look to build your internal capacity to make some changes to really let families in.  Making the commitment to change your board's climate and practices and successfully engage families and youth involves planning with your board.
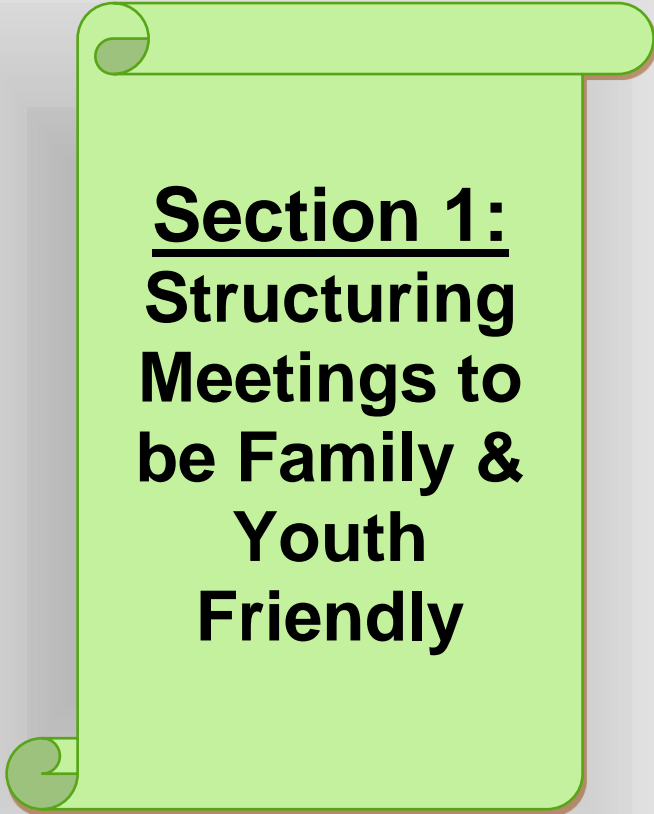
## *Other Resources for Your Board*

- *Mental Health Consumer Participation on Boards and Committees: Barriers and Strategies.* 1989. Developed by M.B. Valentine and P. Capponi with the Human Interaction Research Institute in collaboration with The GAINS Center
- *Partnering with People with Diverse Abilities On Consumer Advisory Boards, Best Practice Guide.*  Developed by Judith Stevens, M.Ed. and Barbara Ibañez, M.A., with the Center for Development and Disability Partnership Initiative Project at the University of New Mexico in 2004
- Pires, Sheila A. (2002). *Building Systems of Care, A Primer, Spring 2002.* Human Service Collaborative, Washington, DC
- Kahn, R., Lynn, J., Braga, A., Hoxworth, T. & Donovan, K. (2008). *Youth Partnership for Health: Engage Youth! Colorado's Guide to Building Effective Youth-Adult Relationships*.  Denver, Colorado: Colorado's Youth Partnership for health, Colorado Department of Public Health and Environment

## *Materials and Examples*
*(available at: http://sparkpolicy.com/fiscalfam_youth.htm)*

- ✓ Board Self Assessment on Family and Youth Involvement.  *This assessment includes questions for your board to discuss as you develop a plan for increasing the family and youth leadership on your board.  The worksheet will help to identify first steps, create a plan, and define the outcomes your board wishes to achieve.*

# Section 1: Structuring Meetings to be Family & Youth Friendly

# STRUCTURING MEETINGS TO BE FAMILY AND YOUTH FRIENDLY

Board meeting attendance is more consistent when the meetings are accessible, well structured, and provide adequate information for participants to be fully involved. Similarly, family and youth participants are more likely to be active and long term members of a board if the structure is understandable to them, with information that helps them to be fully engaged.

*Structure* refers to the logistics of the meeting, content in the meeting, materials available before and after meetings, and the relationship building that occurs as part of participating on a board.

## *Meeting Time, Location, and Call-in Flexibility*

Consistent participation by board members, including families and youth, is often dependent on the meetings being easily accessible. When setting up the meeting times, locations, and use of technology to participate, it is a good idea for boards to consider the needs of the families and youth they hope to recruit or the specific families and youth already participating.

*Meeting Times:* Some families and youth are able to attend meetings during work hours, but for many typical meeting times can be a barrier to participation. Boards may want to explore meeting times that balance family and youth needs with other board members needs, such as late afternoon meetings that occur after school hours, evening meetings with dinner provided, or even Saturday meetings. Moving board meetings outside of traditional working hours requires a commitment to authentic family and youth involvement on the part of all board members.

*Transportation Issues:* Transportation issues can become significant barriers for families and youth wishing to participate on a board. Depending on the families and youth participating, boards may want to move their meetings to locations that are more accessible by public transit and/or have free parking available. Carpooling or coordinating ride shares might also be an option.

*Locations:* Not only is it important to consider whether the location is accessible in terms of transportation, it's also important to ensure that the location is comfortable for all participants. Boards might want to consider holding their

> For example, meetings held at county court houses, or hospital settings, regardless of how nice the meeting rooms may be, may feel intimidating to families and youth. Meetings held in mental health centers or other service centers have stigma associated with them. Board meetings in community venues unrelated to specific service system issues are more accessible for many families and youth.

meetings at recreation centers, community centers, libraries or faith communities.  We recommend that locations also be handicapped accessible, and generally appropriate for and accessible to those populations from which you are hoping to have participation.

*Interpreters:* If you have family or youth members who are not fully fluent in English, you will need to provide interpreters (including possibly sign language interpreters) and translated documents.

*Teleconferencing:* Making teleconferencing available can be helpful for all board participants when they are unable to attend in person.  The meeting norms can still be to participate in person, but by creating technology access for those unable to attend in person, the board will have a greater opportunity to engage families and youth in the discussions and decisions they are making.

## *Pre-Meeting Orientations*

New board members bring new ideas and fresh viewpoints to board service.  They typically need help in keeping the big picture, not their special interest issue, in mind and in learning about the boards history, goals, and current activities. This is no different for a family or youth participant.  Creating orientation materials for new board members can benefit all new members, not just the families and youth.  Typical topics to include in orientation materials are:

- Mission, vision, and values of the board;
- Bylaws for the board: Voting rights, Grievance, Length of term, Code of conduct
- Statement of the board's responsibilities;
- Board history and accomplishments;
- Board goals and current activities;
- Future activities;
- Biographies of current board members and staff to the board;
- Name and contact information of the board chair and key staff;
- Meeting expectations; and
- Scope of work for board members – their roles and responsibilities;

> Job Description: For example, a job description could include:
> - Always put the mission of the board before single issues;
> - Devote time to learning the history and past decisions;
> - When you speak in community settings, you speak as a representative of the board;
> - Focus on the big picture, instead of the small details; and
> - Represent your constituency by bringing a broader perspective to the board.

A scope of work, job description, or role definition for board members should outline the required number of meetings per year, the extent to which board members are

> Acronyms: For example, your board may spend time talking about developing systems of care.  To make sure the term is understood, either take time to briefly explain it in meetings or include a description in the orientation materials.

expected to review materials between meetings, and the types of "homework" that board members may be asked to complete between meetings. Additionally, it is useful for all participants, including families and youth, to clearly lay out expectations for how the participant will bring to the table the perspective of the constituents they were appointed to represent.

## *Meeting Decorum*

Participation in board meetings can be overwhelming for new members who have not been involved in the discussions and learning that has happened over time as part of board participation. To help new members fully participate, including family and youth participants, it is important to:

1. Avoid using *acronyms or other jargon* whenever possible. Think about the language used to eliminate a sense of intimidation. Sometimes, it's not easy to do, when key names or phrases are a common part of what the board talks about. Consider developing a glossary of terms or acronyms used in board meetings.

> Background: For example, if the board is revisiting a program it funded last year, rather than diving into the outcomes from the program, take time to describe the purpose of the program, how much it was funded for, and the expectations the board had for the program. This will most likely be useful not only for the family and youth members, but for the other board members as well.

2. Provide *background information* on each topic covered during the board meeting. In general, if it wasn't discussed a very recent previous meeting, then everyone can benefit from a review.

> Examples of norms that support authentic family and youth involvement include:
> - Give opinion not judgment;
> - Listen actively and seek to understand;
> - Respect others and do not interrupt;
> - Avoid sidebar conversations; and
> - Assume positive intent.

3. Create *meeting norms* that define the behaviors and expectations of board members to ensure the meeting is effective and successful.

4. At the start of the meeting, particularly when new members are present, conduct an ice-breaker or 'get to know your exercise' to enhance group cohesion.

## *Post-Meeting Follow Up and the Role of Meeting Minutes*

All board members will periodically miss meetings. For family and youth participants representing populations who are involved with mental health, substance abuse, special education, child welfare, juvenile justice, chronic health care or other public service

systems, it is important to recognize that they may miss meetings due to family crises that have to take precedent over board involvement.

To support a family member or youth's continued involvement, post-meeting follow-up and information plays an important role:

1. *Meeting minutes* that clearly outline not only the decisions made, but also the discussion leading up to the decisions, can help prevent rehashing the same issues over and over as different board members attend each meeting. They will also help families and youth to identify if key decisions have been made where family and youth input would have significantly changed the course of the discussion.
2. *Individual follow-up* by phone or email, depending on what the family or youth participant prefers, can help keep them engaged between meetings. If the family or youth participant has indicated they will not be able to make it to a meeting, it can be helpful to let them know about the issues coming up and get their input prior to meeting.
3. Make sure to identify the best *contact person* if the family or youth participant has questions or concerns about the meeting they missed.

## *Ongoing Relationship Building and Mentoring for Families and Youth*

A mentor system will help new board members to become comfortable with their new role and understand how the board works. For families and youth participating on a board, it can also help them feel less isolated from the rest of the board members. Mentors can:

- Provide context and history, any relevant policies and procedures, including decision-making and voting and grievance issues;
- Make sure new member's needs are being met, including addressing any concerns about the content or structure of the meeting and helping resolve misunderstandings or conflicts;
- Advocate for the new board member, particularly if the family or youth participant is not comfortable speaking up for themselves; and
- Be the consistent contact for the family or youth participant throughout their board involvement, including taking time for pre-meeting discussions to ensure the new board members ability to fully participate in the process.

When assigning a mentor to a family or youth participant:
- Make sure that the board member has the time and interest in being a mentor;

- Make sure that the board member and the family or youth participant understand the role of the mentor;
- Check that the mentor board member has the content and knowledge needed
- Find whether the family or youth participant is comfortable with the mentor on a personal level;
- Consider that matching is sometimes effective between opposites, as they provide divergent thinking and may balance one another's perspectives
- Consider the role of age, race and ethnicity, gender, and other factors when matching board members with family and youth participants.

## *Creating a Safe Place for Disclosure*

Families and youth who are invited to participate on a board contribute their personal stories to the expertise and knowledge of the board. For board members representing organizations instead of families and youth, many work in the field of behavioral health because they too have personal and family experiences with behavioral health issues. These professionals are not expected to self-disclose and speak from their own life story if they choose not to, but because we often expect that of family members, it is important to create a safe place for them share their stories.

> For example, during introductions everyone could be asked to share why the issues facing the board are important to them. This does not require anyone to disclose their stories, but does help to equalize the dialogue, because everyone, not just the family, is introducing themselves as someone passionate and personally invested in the issues facing the board.

To create a greater sense of safety and equality, boards can make a point to have everyone bring personal stories or personal passion for the issue to the meetings.

## *Strategies for Acknowledging the Unique Perspectives of Families and Youth*

Families and youth bring to the board values that have been tested and reinforced by their experiences as service users in behavioral health and related systems (Lazear, 2004). They bring a unique perspective to the board and can give a realistic view of how policies and programs impact consumers. Regular acknowledgement of this perspective can be reinforced by:
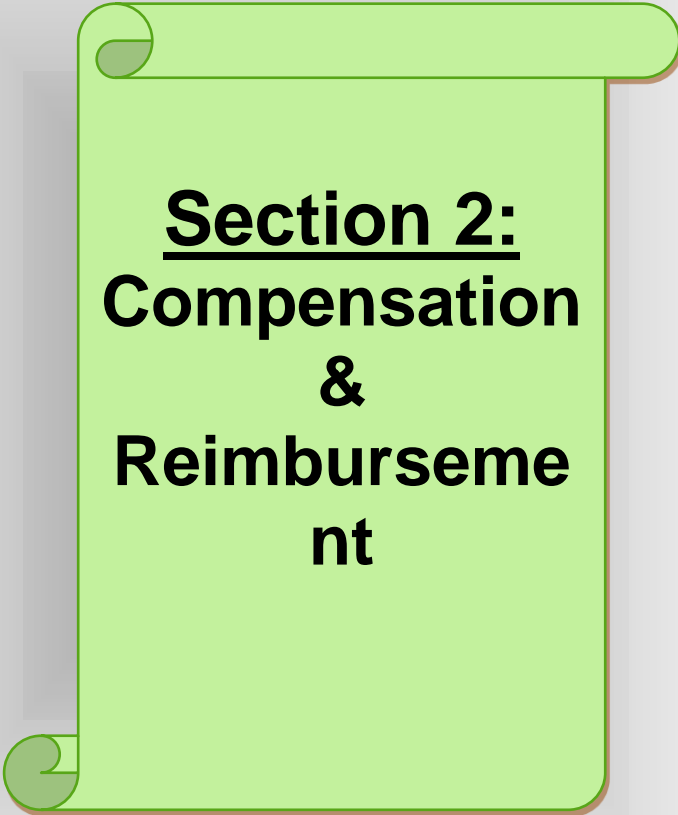
- Asking families and youth to initiate a discussion related to an area of their interest or concern;
- Ensuring no new policy or procedure is initiated until families and youth have opportunity to weigh in along with all other board members;

- Exploring whether and how families and youth can take the new initiative, policy or procedure to a larger group of families/consumer/youth to vet and provide feedback and input;
- Recognizing that families and youth may have a difficult time to giving constructive feedback if the room appears to strongly in support of the issue and develop alternative ways to pursue their perspective such as written feedback or a more intimate setting;
- Acknowledging that the perspective of a service user is invaluable to the process and offers insight that no one else is able to provide; and
- To use active listening skills and paraphrase to ensure understanding of the perspectives offered by families and youth.

## *Materials and Examples*
*(available at: http://sparkpolicy.com/fiscalfam_youth.htm)*


- ✓ Example Bylaws
- ✓ Example Letter of Agreement between Boards and Board Member
- ✓ Example Orientation Packet
- ✓ Example Meeting Norms
- ✓ Example Meeting Minutes Template
- ✓ Example Acronyms List
- ✓ Family and Youth Involvement Top Ten Do's and Don't's Lists

# Section 2: Compensation & Reimbursement

# COMPENSATION AND REIMBURSEMENT

It is an established norm in the nonprofit sector that board members (who are not employees) do not receive compensation for their board service, other than reimbursement for expenses directly related to board duties (Minnesota Council of Non-Profits Governance Basics, n.d.).  On policymaking boards, it is common for the majority of participants to be professionally associated with the policy systems the board is addressing.  For this reason, it is common practice to not compensate the participants for their board service either.

However, there are reasonable exceptions to these practices.  Family member and youth consultants who serve on policymaking boards or boards of service organizations are often not compensated.  They may have to take time off of work or school, pay for transportation, and secure childcare services in order to attend meetings.

Offering compensation for family and youth consultant participation shows the organization's commitment to the family and youth perspective and knowledge.  For many service organizations, their families and consumers may be economically challenged and receive public benefits.  For all of these reasons, a policy to compensate family and youth members not otherwise compensated for their board service is important.

*Colorado Example: In Colorado, The Mental Health Planning and Advisory Council has made the most progress on the legal conditions of reimbursement for individuals receiving public assistance benefits. Family members and youth are an essential constituency by statute of the Council.  Colorado and Nevada are leaders in moving consumer compensation issues forward nationally and have made necessary accommodations to ensure family members are reimbursed for their participation on Planning Councils.*

Consensus around and financial support to sustain family involvement will call for (dedicated) funds. Opportunities may exist as a carve-out of current budgets or may require additional dollars.  Your board or a designated fundraising subcommittee may need to explore grant writing to local or state foundations or make request to community or state agency partners for a financial contribution and/or offer ongoing peer support and/or training as an in-kind contribution.

*A Colorado delegation is attending the first ever national policy academy on family-driven services, hosted by SAMHSA and the National Federation of Families for Children's Mental Health in February 2009. National reviewers recognized Colorado's outstanding efforts in the field of family involvement all levels of government. The Colorado delegation will benefit from an opportunity to meet with experts in order to establish a sustainable infrastructure for family involvement in the policy arena in Colorado.*

Serving on a board should not in any way add economic stress to a family member or youth representative. Board applicants may receive public assistance benefits. An organization can alleviate any potential financial conflict by encouraging a family member to meet with their benefits specialist before payment for board or committee participation is finalized.

## *Reimbursement and its Impact on Public Benefits*

The challenge of compensating family member and youth consultants on public assistance for board participation is a common one. Some boards compensate family and youth members with cash stipends, while others use gift cards. Both gift cards and stipends can impact the public assistance benefits that a family member or youth representative may be receiving from state or local funds. As of January 2009, all federal (state and county distributed) assistance programs have similar guidelines for defining income:

*Federal Income Definition:* "Anything you receive in cash or in kind that you can use to meet your needs for food and shelter."

The rule for gift cards follows the basic Social Security Income (SSI) rules. If the item can be converted to food or shelter, it counts as income. If the gift card can be used to purchase food or shelter items, or if the card can be re-sold, the value counts as income under SSI rules. Thus, both gift cards and stipends are considered unearned income.

For a gift card not to count as income, it needs to have a prohibition on the resale or transfer of the card, and the card must be limited to purchases that are neither food nor shelter. It is important to note that the restriction on resale must be a legal one; e.g., a legally enforceable prohibition on resale or transfer of the card imposed by the card issuer/merchant and printed on the card.

For all of these reasons, the use of gift cards and stipends can be problematic for families and youth receiving public benefits including Social Security Income, Social Security Disability Income, Medicaid, Food Stamps, etc. For other families and youth, who do not receive benefits based on their income level, this may not be an issue.

*It is highly recommended that the family and youth representatives contact their benefits managers to access the impact of any type of stipend on their benefits.*

## *Reimbursement and Transportation and Parking*

To reduce any burden on family and youth participation, you may consider reimbursement for parking, gas, and public transportation costs to and from board meetings. Since this does not constitute any funds toward food or shelter, reimbursement for transportation will not impact assistance programs. Example reimbursements include:

- Bus tokens;
- Mileage reimbursements;
- Reimbursement for taxis (if meetings are held at a location not easily accessible by bus, light rail, or other public transit options);
- Reimbursement or validation for parking lots; or
- Reimbursement for parking meters.

Depending on your funding streams, reimbursements for transportation may require a legal receipt.

A board representative could work with the family and youth representative on providing directions, recommending parking facilities in the area, identifying bus routes, or arranging for a ride share with another board member if possible.

## *Reimbursement and Childcare*

To reduce any burden on family and youth participation, boards may wish to identify a policy for providing or reimbursing for childcare. Some options include:

- Direct reimbursement for childcare expenses. Since this does not constitute any funds toward food or shelter, reimbursement for childcare will not impact assistance programs.

- Providing childcare on-sight or near the board meeting location. This may eliminate the need for family members to find childcare on their own time. However, the board may have the same issue that parents have: finding a reliable childcare provider for a special needs child can be very challenging due to the extra attention, patience, and knowledge required. If the board chooses to provide childcare, we recommend that the board ensure the childcare provider has experience with special needs children.

- Offer assistance to family members through local resources, including helping arrange the childcare services, such as:

- o Colorado Association of Family Child Care:
  http://www.coloradochildcare.com ;
- o Health Care Program for Children with Special Needs: Colorado
  Department of Public Health and Environment.
  http://www.cdphe.state.co.us/ps/hcp/ ;
- o Nannies Needed: Some nannies listed have experience with special needs
  children: www.nannyneeded.com/colorado.htm ;
- o Kidstreet at The Children's Hospital: Uniquely designed to care for infants
  and children with complex medical needs.
  www.thechildrenshospital.org/conditions/rehab/kidstreet.aspx
- o Metro Denver Child Care Resource and Referral: A free childcare referral
  service of licensed providers available for Adams, Arapahoe, Denver,
  Douglas, Jefferson, and Broomfield counties. http://www.frcce.org/
- o Head Start staff: Often staff people from Head Start programs have
  experience and skills to work with special needs children and may be
  available for evening or other off-hours childcare.
  http://www.coloheadstart.org/

- Additional community resources for child-care may include:
  - o Program staff already trained with working with the target population;
  - o Local service / disability centers working with the population;
  - o Local religious institutions;
  - o Local college or university;
  - o Respite providers; or
  - o A baby-sitting co-op with other parents on board and committees.

Depending on your funding streams, reimbursements for childcare may require a legal receipt.

## *Reimbursement and Youth*

Reimbursement for youth presents additional challenges. While adults may be expected to largely be able to manage their own transportation needs, the same may not be true for youth. Rather than reimbursing youth for transportation, your board may want to arrange transportation for the youth. Many boards are not comfortable providing cash stipends to youth, and gift cards are a common choice. However, it is important to ensure the gift cards are to stores that are relevant and of interest to youth participants. Please see Chapter 4 on youth participation for more information, options, and example reimbursement forms.

## *Other Reimbursement Considerations*
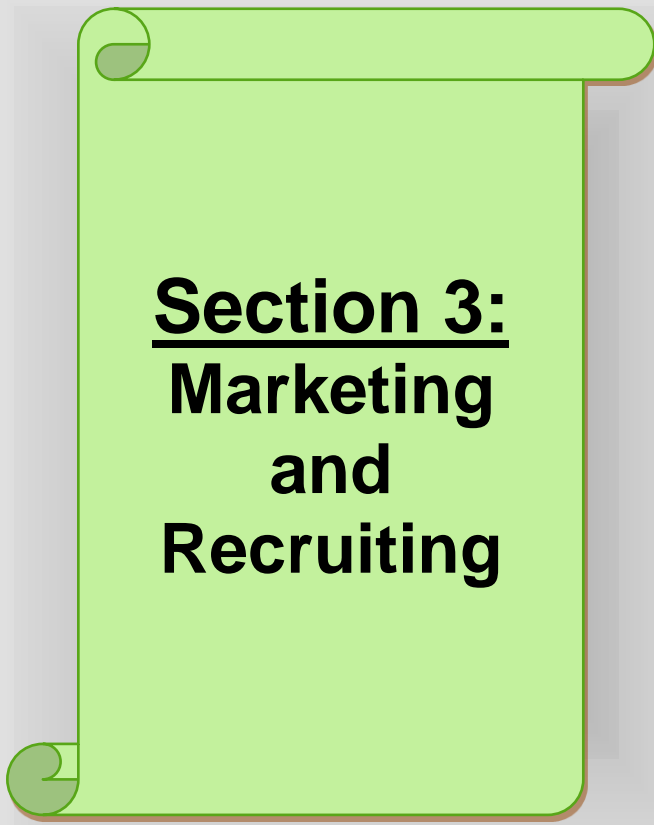
Organizations will also be required to collect IRS form W-9 from each individual and issue IRS 1099 forms at the end of each year for the amount paid out.

An alternate or additional way to compensate board members may be to provide scholarships to family or youth members for conferences or trainings. Opportunities to co-present at conferences or trainings with other board members are also of value.

## *Materials and Examples*
*(available at: http://sparkpolicy.com/fiscalfam_youth.htm)*

✓ Example Compensation and Reimbursement Form

# Section 3: Marketing and Recruiting

# MARKETING AND RECRUITING

Family and youth participation begins with identifying the right people to bring to the table to represent the important issues that a board is tackling. In addition, clarification for new members on the obligation of the board is crucial in assuring a good match between participants and mission. To recruit families and youth to participate on the board, a few first steps include:

1. Identifying the issues and/or population that need to be represented on the board;
2. Developing marketing materials that clearly define the board's purpose, the vacant position on the board and expectations for membership as well as the qualifications of a potential family or youth representative;
3. Including the availability of compensation and reimbursement, locations of meetings, timing of meetings, and other relevant information in the marketing materials;
4. Identifying venues where families and youth with the desired backgrounds can be accessed; and
5. Disseminating the marketing materials and an application in the identified venues.

Each step takes time and may include developing new materials for the board.  Issues for a board to consider, content for marketing materials and applications, and example materials are included below.

## *Identifying the Perspectives to Recruit*

There are many ways to define the population whose perspectives you wish to recruit. For example, you could seek a family member or youth with:

- Specific types of needs, such as substance abuse services or housing services;
- Experience in specific systems, such as juvenile justice, mental health, and TANF;
- Experience with service systems at a specific age, such as early childhood, transition age, or older adults;
- Experience with specific types of services or service delivery models, such as restorative justice or systems of care;
- Experience with specific agencies, such as the Division of Youth Corrections or a county child welfare department;
- Experience receiving services in a specific geographic area, such as the state, a county, or a school district;

- Specific demographic characteristics, such as a specific race, ethnicity, gender, or socioeconomic status; and
- Specific prior experience or training in family and youth advocacy, leadership, or board participation.

A board seeking to develop family and youth participation will want to consider what perspectives are most relevant to the mission of the board, the typical discussions and decisions made by the board, and the future goals and activities of the board.

Boards need to be realistic about the perspectives they can expect to have represented on their boards. If the desired perspective is too narrowly defined, it may be very difficult to recruit participants. If the desired perspective requires experiences that are heavily stigmatized, it may be difficult to recruit participants willing to disclose their qualification to represent the perspective.

## *Marketing Materials and Applications*

After identifying the perspectives most relevant to the board's mission and activities, the next step is to create and disseminate marketing materials and an application form or process. Marketing materials could include:
- The board's name, mission, and other descriptive information about its activities;
- A job description, duties and qualification for the family or youth representative. This where the information about the perspective the board is seeking can be included;
- Information about where, when, and how frequently the board meets, so families and youth can determine if they are available for the meetings; and
- Information about consultation fees or reimbursement for mileage, child care, or other costs associated with participating on the board.

The application form or process can be a paper or electronic form submitted to a key contact on the board or a phone call interview with the contact on the board. The application process could include:
- Questions about the perspective that the family member or youth can represent;
- Questions about the experience of the family member or youth with participation in similar venues. Lack of experience as participants on boards is not a disqualifier, but it can be helpful when considering what orientation process will be needed;

- Collection of demographic information if relevant to the perspectives desired, including what city the family member or youth lives in or has recently lived in and their race, ethnicity, gender, etc.;
- Questions about their availability to participate in the meetings as currently scheduled; and
- A question on their preferred method of communication (telephone, email, or snail mail).

Depending on the advertisement strategy, the marketing materials and application may need to be hard copies, online documents, or both. Regardless, formatting them to be clear, concise, and easy to read can help increase the number of potential family and youth participants who will read the documents and apply for the position on the board. Flexibility in application completion is important, since everyone does not have access or familiarity with computers and recognition that English may not be a candidate's first language.

## *Advertising Venues and Strategies*

When advertising for family and youth participants, the first step is to identify what venues, existing information dissemination tools, and individuals or organizations have access to families and youth who represent the perspectives the board has identified as important. Venues may include:

- Service delivery centers, such as local health clinics or mental health centers;
- Support groups related to the perspective that the board has identified;
- Drop in centers or other gathering places that cater to individuals with the perspective the board has identified; and
- Local grocery stores, laundry mats, churches, and recreation centers in geographic areas relevant to the perspective the board has identified.

Information dissemination tools may include:
- Neighborhood and minority newspapers;
- Family or youth support group newsletters;
- School and church newsletters for families or youth;
- Local radio and TV stations; and
- Community list-serve sites for parents/consumers.

Individuals and organizations with have access to families and youth may include:
- Family, consumer, or youth advocacy organizations;
- Family, consumer, or youth leadership academies;

- Other boards with active family, consumer, or youth involvement; and
- Board members individual contacts who they believe can help advertise through word of mouth.

Personal outreach is highly encouraged and can be very useful when recruiting families and youth. Asking direct care providers to talk with their clients about the opportunity or presenting the opportunity to participants in a focus group or individuals at a drop in center are all ways of personally engaging potential applicants for the position on the board.

If the board already knows of individuals interested in participating, it is a good idea for a board member to make a personal outreach to the person, such as meeting them in the community informally to discuss the job expectations, time commitment and share interests and motivations for participating.

By far the best way to engage families is personally. Your personal outreach and effort to meet with families at their gathering places, describe the need, and recruit for your board will be most productive.

## *Recruiting from Underserved Populations*

Many boards make decisions on issues that directly and sometimes disproportionately have an impact on consumers from diverse backgrounds. Such boards may wish to recruit family and youth participation from underserved populations to increase their ability to make decisions that reflect the unique experiences of the consumers in their service delivery systems.

Underserved populations may include:
- Ethic or cultural minority groups;
- Gay, lesbian, bisexual and transgender populations;
- Rural consumers; and
- Transition age youth.

Opportunities to reach out to diverse populations:
- Partner with community leaders to recruit through trusted channels in diverse communities.
- Religious organizations;
- Neighborhood and community groups;
- Resource centers; and

- Service providers who specialize in meeting the needs of diverse populations may also be able to help recruit families and youth.
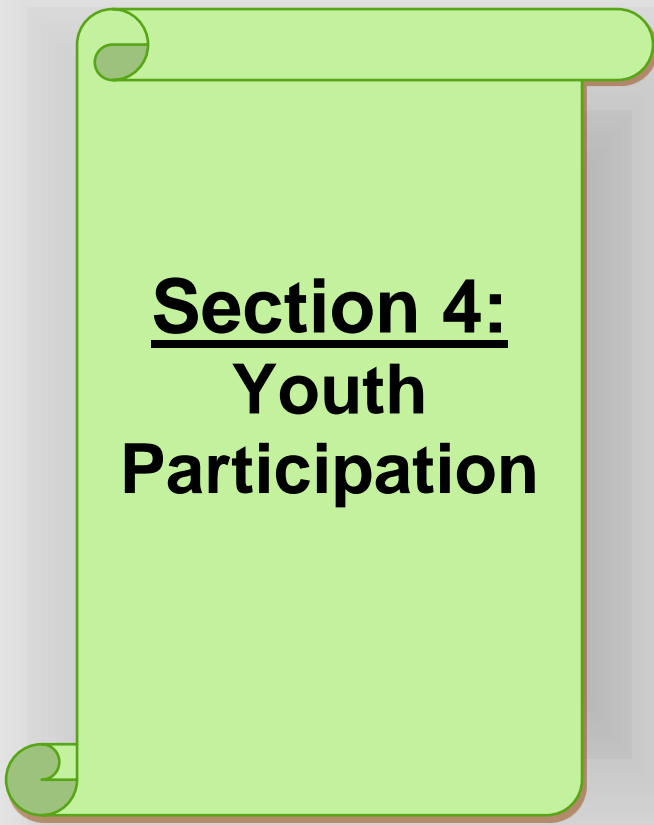
Suggestions and considerations:
- Advertise in languages other than English;
- Use You Tube, My Space and other social networking entities
- Provide for translation services (for meetings and materials) for recruited non-English speakers;
- Establish an advisory team of diverse consumers to provide guidance and participation on issues affecting diverse populations;
- Make efforts to meet in locations other than traditional service sites to minimize any potential location stigma on part of the participants; and
- Stress any effort to minimize tokenism by encouraging a partnership or more than one consumer on the board.

## *Materials and Examples*
*(available at: http://sparkpolicy.com/fiscalfam_youth.htm)*

- ✓ Example Board Perspectives Checklist
- ✓ Example Recruitment Flyer
- ✓ Example Recruitment Letter
- ✓ Example Family and Youth Board Member Application

# Section 4: Youth Participation

# YOUTH PARTICIPATION

Boards that deal with issues of relevance to youth are increasingly recognizing that youth involvement helps to form policy that is more effective and responsive to the needs of young adults. Incorporating the young adult voice has challenges that are all its own, but the rewards are unique and worth the effort.

*Benefits.* Boards that engage youth as members often find those youth to be significant assets, not only to the board itself but to the policies it creates. Involving youth in this capacity has been gaining support as a means for the youth to build self-esteem, learn decision-making and problem solving skills, and to explore the world of work. It allows youth to develop a strong sense of civic responsibility and hone their leadership skills while having an authentic voice in shaping the policies and outcomes that are meant to benefit them.

Allowing youth to build those skills has multiple uses to the board. The mere presence of a youth is a continual and extremely useful reminder of what the population the board seeks to aid is really like—it is sometimes all too easy for adults to forget what being an adolescent is actually like. Our adolescent experience

> *"Adults, in general, behave better in a mixed age group."*
> *- Youth Infusion, Lesko, 2006*

varies based on context and background. A young adult can share his or her own experience to help shape policies so that they are more likely to work for other adolescents.

Too often adults "talk at" youth and develop policies "for" youth instead of listening and participating with them to develop and establish policies that will actually work. Offering youth the opportunity to help develop the policies that will impact them is a sure way to create buy-in, ownership, and ultimately, better policies. And you may even find that adults are positively influenced by the presence of an energetic young person!

*Things to Remember.* There are a number of logistical, legal, and other issues to keep in mind when involving youth in your board. It is strongly recommended that you take some time as a board and openly address the issues below before youth board members begin to attend meetings.

It is a good idea for the parents or guardians of a youth board member to have regular contact with at least one adult member of your board. One option is for this member to

be the primary contact for the parents so that time commitments, any special needs, and transportations concerns can be addressed. You can also invite the youth's parents to events. And so as not to create any misconceptions on the part of the youth, it is a good idea to be very clear that you are in contact with their parent or guardian.

While Chapter 2 discusses issues and strategies related to fees, transportation, and barriers for family members, there are additional factors to consider with youth. Your board will need to establish a protocol to compensate youth for their time with an honorarium, stipends, or consultation fee. It is also necessary to consider the manner of compensation so that you do not negatively impact any public assistance benefits. Travel and other expenses related to board participation should be covered by the board (Matarese et al, 2005).

In addition, it's a good idea to consider the following areas (Matarese et al, 2005):

- Meeting Time. The meeting time cannot interfere with school, work or extracurricular schedules. Your board may want to consider being flexible in meeting dates and times, and discussing it with the youth board members at the beginning of their school term;

- Refreshments. Youth will want and need to eat, just as adults. They can contribute to a potluck or benefit from your catering budget, but either way it is not a bad idea to make food available.

- Mentor recruitment and training. It is best if you are able to recruit and provide training to the designated board youth mentor. That mentor should at a minimum talk to and ideally meet with the youth at least once before the first board meeting.

- Potential language barriers. It will be important to identify and support linguistic needs (e.g. interpreters) as necessary. Whether because of jargon, pace, or the use of acronyms, your board will need to be sensitive to all discussion short cuts that might prevent any new member, not just youth, from understanding the conversation.

- Potential cultural barriers. It is suggested that new members share any barriers for meeting board member expectation due to observances, holidays or other cultural impacts.

- Diversity. Diversity awareness is similar to what has already been addressed in reference to family members. However, some people say that youth have their own culture. It is therefore important to recognize and accept the dialogue, posture, habits and style of dress that are distinct to youth, as well as to be clear about the expectations and norms within the group.

- Mutual respect in word and deed. If you do not treat them with respect, your new board members may feel as if you regard them as filling a quota and nothing else.

It cannot be stressed enough that making decisions with youth from the beginning can make dealing with these issues a great starting place for a profitable relationship rather than a set of pitfalls. Find out what times work best for the youth you hope to recruit. Identify a location with many transportation options or provide transportation for the youth. Ask youth what materials and equipment they need available to successfully participate as partners (Lynn & Kahn, 2007). If you start out with open, straightforward dialogue, you will have accomplished much towards establishing the kind of relationship that will benefit you both!

Transparency is essential. This is especially important when hands are tied due to policy or other reasons so that youth still feel heard, even if their ideas cannot be acted upon.

*Organizational Benefits.* These benefits were determined by a study conducted at the University of Wisconsin, Madison:
- Youth involvement becomes systemic;
- Commitment to focused mission;
- Know what does and doesn't work;
- Inclusion of under-represented groups;
- Action orientation- increased community outreach; and
- Appeal to a potential funder.

*A Word About Tokenism.* There are several ways to make a youth board member feel like a token:
- Having just one youth on a board;
- Treating your youth board members like observers; and
- Giving the adult members access to equipment and materials that the youth is not permitted to access.

Strategies to reduce tokenism:
- Consider the possibility of bringing on 2 or 3 youth at a time and encouraging all or any to attend all meetings whenever possible.
- Consider a two-year term to give the youth time to become familiar with the board. Then they can help to transition other youth onto the board as their term comes to an end.

- Speak directly to youth and ask clear questions particularly in the beginning, to foster engagement

*On Time for Reflection.* Time for reflection is equally important for youth as it is for adults. Youth need time to think about your offer once it is made, and they may need a little guidance on what they should consider before making a decision. When you invite a youth to become a member of your board, you might ask them to reflect upon the following and not give their answer until they have thought it over (Youth in Governance, 1994):

- How does the board's mission reflect your values and interests?
- How does this board help you fulfill your goals and aspirations?
- Did you feel comfortable with the board members?
- How do you feel about making a contribution of time and energy to this board?
- How can you see your strengths and talent benefitting the board?
- What other information do you need before you make the decision the join?
- Will your family support you in this endeavor? Who can we contact?
- Will the meeting times and expectations interfere with your school/work?
- Do they have a referral of another youth that would be interested in board membership?

## Strategies for Engaging and Retaining Youth Participation

*Recruitment Strategies.* The amount of energy you put into recruitment and selection will be reflected in the caliber, diversity, and commitment of the youth you select. It is therefore doubly important to prepare fully before beginning the recruitment process. Before you begin to recruit youth, we recommend that your board:

- Clearly articulate why they are seeking youth input;
- Develop a board policy that stipulates the inclusion of youth;
- Have a strategy for involving the youth in the decision-making process.

*Retention Strategies.* When youth are treated with respect and trust they tend to do a good job. They are very good at living up to or down to an adult's expectations. Creating an environment where the youth feels engaged, motivated, and valued is not only about coaching and mentoring the youth, but also about training the adults on how to work with youth. When youth encounter excessive guidance and the kind of supervision that is born of distrust, they will rebel. (Youth in Governance, 1994) Your board members need to expect the best and communicate high expectation and levels of trust.

There are four key strategies to retaining youth (and adult members) on your board:

1. Provide the youth in advance with the materials they need to come to the meeting informed and ready.  Without adequate support, their missteps will reinforce prevailing stereotypes and demeaning attitudes.
   - Send board meeting invitation out well in advance of board meeting.  The meeting invitation will often include objectives for the meeting, a meeting agenda with the youth listed, and any logistical information. Even if the other board members know the logistical information because it is the same as always, it is a good idea to list it explicitly for each meeting.
   - Send out a reminder just prior to the meeting with RSVP and/or dial in information if unable to attend.
   - Provide a list of the commonly used acronyms.
   - Identify and support any cultural and linguistic needs (i.e. interpreters) particular to the youth

2. Clarify roles and responsibilities
   - Discuss specific responsibilities and the youth's role with youth and adult supporters.  This can be done by the mentor or by someone else.
   - Review the meeting objectives.  Discuss both the specifics on the topics of the meeting and youth's role as regards those topic areas.
   - Ensure that the adult support and the youth have developed a coaching schedule to prepare for the meeting or presentation

3. Establish a clear set of ways in which youth can participate.
4. Give youth a chance to facilitate a piece of the meeting
   - Identify several opportunities for youth participation, like committees, interviewing administrators, meeting with existing youth boards, reviewing certain policies/procedures for input, etc.
   - Utilize multiple formats within the meetings, such as presentations, small group discussions and surveys. Adults will likely appreciate the variety as well!

5. Conduct a Skill and Interest Inventory.  A good match is the key to the success of youth in governance.  Please also see the form on the website (http://sparkpolicy.com/fiscalfam_youth.htm) called Youth Skills and Interest Inventory Form.
   - Help youth to identify what they have to offer the board by conducting a skill and interest inventory.  An inventory may begin with: "I am good at" and then contain a list of skills, like writing, analyzing, recruiting, public speaking, etc, or "I am interested in", with examples of mental health,

changing systems or sharing my experience with others  The youth would then circle the appropriate area.
- Match the youth with tasks that align with their interest and skill.  For example, a young person with artistic skills may help to format or develop and printed materials your board is developing.

*Mentors.*  As recommended previously, a mentor is an excellent way to increase retention and satisfaction of new board members.  A mentor can provide an understanding of the board mechanisms, expectations, history, members, and roles.  The main thing to consider when choosing an adult mentor for a new youth board member is that he or she is eager to cultivate the youth voice, has shown patience, and is level-headed. It is also important to make sure that he or she has the time to dedicate to supporting this young person.

It is also a good idea to provide the mentor with some suggestions appropriate for the particular case of mentoring a new board member.  Here are some suggestions you can make to the mentor:
1. Dedicate time to adequately support the youth;
2. Meet and orient the youth prior to the first meeting;
3. Reach out to the parents or guardian of the youth;
4. Arrange to meet youth before and after subsequent meetings to prepare, process and answer any questions that a youth might have;
5. Train the youth in the appropriate skill sets for their role in a particular meeting;
6. Involve youth in developing content and, if possible, setting the time and location for the meeting;
7. Explain a few of the more commonly used Roberts Rules of Order, or other board decision making protocol used, particularly how to make a motion and second a motion and how to make requests for the floor and the agenda.

> ""Partnerships of any type are challenging, and youth-adult partnerships are no exception. Bringing people of different ages and backgrounds together requires facing some barriers."
> —Jones & Perkins, 2006; from the YPH guidebook

## *Additional Issues that May Arise when Youth Participate*

*Sharing Power.*  It is difficult for any organization to share power with a new partner, and this may be particularly true as it relates to sharing power with youth.  To address some of the unique challenges present in a youth-adult partnership, it is crucial to

recognize that it may be particularly difficult for adults to see youth as worthy of power. Likewise, for many youth, power sharing may be a new and difficult role. The structure of voting, how to establish an agenda item for discussion, and how to raise a concern should therefore be reviewed with all members toward the beginning of the youth's term.

Some staff may not be forthcoming about their resistance to giving youth an equal vote, or they may not even truly understand the cost-benefit of youth engagement. A frank discussion about the level or model of youth involvement is necessary to address any lingering misgivings (Youth in Governance, 1994). Training for both youth and adults is available and recommended – please see below resources to access training available for Colorado communities.

Adults may need to take cultural competency or responsiveness trainings to prepare for working with youth. Youth culture is just as unique as any other culture that adults may encounter in their jobs. [Sometimes the most inspirational messages come from youth who, in their innocence and optimism, risk saying what needs to be said (Youth in Governance, 1994).

Youth are sensitive to language. The language adults use provide clues to their attitude towards youth, and youth will pick up on those attitudes. So it is a good idea for adults to review some of the key pitfalls of language as regards youth:
- Do not call your youth members 'kids' or 'students' – refer to them as 'young adults', 'people' or 'partners';
- Be an ally and help youth represent themselves instead of talking for them;
- Check competitiveness at the door: work together to support youth; and
- Be sensitive and open to dissent. You do not have to agree on everything. Ideological differences will exist with youth just as they might with other adults on the board.

*Policies and Procedures.* Sometimes board policies can get in the way of successful youth-adult partnerships. They may not provide for enough time to make decisions together, or they may include requirements around parental consent for involving youth. Some procedures may not even be policy, but rather a practice that is common to the organization and everyone just "knows." In that case, think about creating some "ground rules" or unwritten procedures. Take a good look at your organization's policies, and identify whether youth will have equal access to information and tools, have equal voting rights, and the opportunity to serve as an officer (Youth in Governance, 1994). If they won't, change your policies.

Finding out which policies are requirements and which are practices that can be changed is a first step. If policies do create barriers, you may need to work with the youth, and even their parents, to overcome those barriers. This may in fact be a logical first step towards engaging youth in developing more youth-friendly policies and signaling the importance your board places on youth involvement.

## *Additional Models to Consider for Youth Involvement*

In addition to having youth on your board, consider some of these other possibilities for youth involvement. For more information on Ad Hoc Committees and Advisory Councils or Committees, please see Chapter 9, Beyond Meeting Participation.

*A Youth Advisory Council / Commission or Adjunct Body*
- *The upside.* A youth commission may be less intimidating and take place in a less formal setting. They may be able to engage in a more open discussion of the decision-making process. Youth commissions can be a great training ground for emerging youth, in addition to allowing input from greater numbers of youth. An adjunct body may also take on more than one role (advise, evaluate, market), and can provide valuable ongoing input to all your issues & policies relating to youth.
- *The downside*. Without a defined role & structure to connect it to the board, it may fall apart and become disillusioned. Adults may struggle to share power with an advisory board, and members may have decreased decision making power. An adjunct board requires more staff time to recruit, train, provide support, and define roles of the advisory board. Finally, with an adjunct body, the full board does not receive the benefit of contact with youth board members.

*An Ad Hoc Committee or Task Force*
- An ad hoc committee or task force is a short-term entity that is created for a specific purpose.

*A Policy Committee*
- A policy committee has an institutionalized role in the board, as mandated by the by-laws. It offers significant advisory capacity from programming to organizational concerns.
- Youth can provide input on any policy ramifications that are specific to youth.
- With a policy committee, it is important to be clear about any limits to the youth's input.

*Given the many challenges facing our state, finding solutions with the help of our youth, our future, is essential!"*
—Representative Roberts

*A Focus Group*
- A focus group is an informal group providing input on recommendations/decisions about youth programs / policies.

*A Mini-Grant Program*
- A group of youth who determine who will receive small grants for a specific youth-related project or initiative.

## Example Boards with Youth Participation

- Bridging The Gap, Mile High United Way
www.knovada.com/jcyoi/btgpartners.asp
- Colorado Youth Leadership Network:
http://www.youthleadership.com/CYLN/cylnmain.html
- The YES! Academy (Youth Empowerment Services Academy), through the Denver Indian Family Resource Center.  http://www.difrc.org/services.htm
- The Colorado Juvenile Justice and Delinquency Prevention Council
http://www.dcj.state.co.us/oajja/Boards_and_Councils/JJDP_Boards%20_Councils.html
- The Mayor's Youth Commission, City of Denver.
http://www.denvergov.org/Default.aspx?alias=www.denvergov.org/YouthComm
- Assets for Colorado Youth, Stephanie Hoy, Stephanie@buildassets.org
- Loveland Youth Advisory Commission.
http://www.ci.loveland.co.us/council/YouthCommission51.htm
- Colorado 4H Youth Development. http://www.colorado4h.org/

## Examples of Youth-friendly Materials

- The Colorado Juvenile Justice and Delinquency Prevention Council's Youth Committee By-Laws:
*"The Youth Committee shall be comprised of all youth members appointed to the Council, interested non-youth Council members, and non-Council youth as appropriate who are appointed by the Chairman at the recommendation of the Youth Committee Members.  The Youth Committee shall have the following duties: to meet a minimum of four times annually to ensure youth input and participation on the Council and to keep the Council informed of current youth issues at the state and national level."*

- The State Youth Council (SYC), led by Co-Chairs Bette Matkowski and Dani Crane, paves a pathway that leads to economic success for youth. The SYC

provides policy recommendations to the Workforce Development Council and the Governor of Colorado that extend support and technical assistance to local youth councils. They also make recommendations on how Youth Discretionary Funds can be invested to ensure that Colorado's young workforce is well-positioned to achieve success via a variety of skill development opportunities, resulting in attaining both jobs in the short term and a capacity for increased earnings over the long run.

*"The Colorado State Youth Council in alliance with the Colorado Workforce Development Council is dedicated to supporting the growth of Colorado's youth. Empowering youth today with resources in Education, Employment, and Economic Development will ensure success of Colorado's future leaders."*

- Student Coalition for Action in Literacy Education.
*"The Board shall consist of 13 – 18 members elected by the Board for staggered two year terms. Youth will be elected to wither two or three year terms. A minimum of four college and university students and two new readers will serve on the Board. Board members will consist of the following areas: new readers, national service organizations, foundations, corporations and other interested in the organization's mission."*

- The Girl Scout Council:
*"Voting Membership: The voting members of the council shall be adult volunteers and girls ages 14 years of age and over who are members of the Girl Scout movement and registered through the council."*

## *Legal Issues*

*By-Law language.* It is important that by-laws on youth representation include:
- The number of youth on the board;
- Term limits (recommend staggered 2 or 3 year terms);
- Expertise and interest in the organization's mission and target population; and
- Voting eligibility.

*Conflict of Interest.* Your Board may be concerned that involving youth in governance will create a conflict of interest. This can easily be addressed by a clearly written conflict of interest policy, which can be a single succinct paragraph. Always consult an attorney. One example of such a policy is taken from the National Center for Non-Profit Board's, "How to Manage Conflict of Interest: A Guide for Non-Profit Boards:

"In the case that a Board or Committee member is aware of a potential conflict of interest with respect to any matter coming before the board or committee, she or he will not be present for voting in connection with that matter. She or he may however participate fully in the discussion of the matter prior to the vote."

*Legal Precedents.* Several states, including Colorado, have laws supporting youth board involvement: Colorado, Louisiana, Michigan, Minnesota, Maine, Nevada, New Hampshire, New Mexico, and Washington. Where the law is silent on the issues of youth on Boards of Directors, the lack of legal clarity can make people wary of inviting youth into boards. Colorado, like many other states, does not have a minimum age requirement for participation on a Board of Directors.

Here are a few suggestions on how to avoid legal difficulties:

- Young people should not be signatories on checking accounts;
- Young people should not sign binding contracts with consultants, businesses or directly be responsible for hiring; and
- In matters related to legal contracts, it is best that young people not have a tie breaker vote.

> *"Young people obviously have a big stake in our future and are affected by what we do in this building. This law will give the youth of Colorado a formal voice in the public discourse."*
> —Governor Ritter

*Colorado's New Youth Advisory Council Bill.* On April 29, 2008, The Youth Advisory Council Bill (HB-08 1157) was passed through the Colorado State Senate. The bill was sponsored by Representative Ellen Roberts and Senator Sue Windels, and it establishes a Youth Advisory Council of 40 voting 14- to 19-year-old members and four non-voting members from the legislature. The council is intended to meet at least four times a year and provide the General Assembly with perspectives from young people on proposed and pending legislation and other issues.

## Lessons Learned

It is always a good idea to benefit from the mistakes others have made! Here are few lessons that other groups have learned in involving youth in their boards and decision-making processes:

- Lack of clarity about the exact responsibility of an adjunct youth group leads to distrust of the authenticity of the boards using the youth perspective in decision-making;
- Board members who may be unfamiliarity with the youth training provided for new board members may leave adults with unrealistically high or low expectations of the youth;
- It is a good idea for youth to be told the extent of their impact and authority and the value of serving;
- Add 2 or 3 youth at the same time to avoid tokenism;

- Provide training: board mission, group norms, decision-making rules, roles and meeting processes including time frame, minutes and voting protocols;
- Provide information regarding parking or other transportation / building particulars;
- Don't forget to have some fun;
- Expect to share personal stories with youth if your expectation is for the m to share their experiences in the system. Disclosure works two ways; and
- Network youth leaders and boards to enhance visibility and importance of youth perspective.
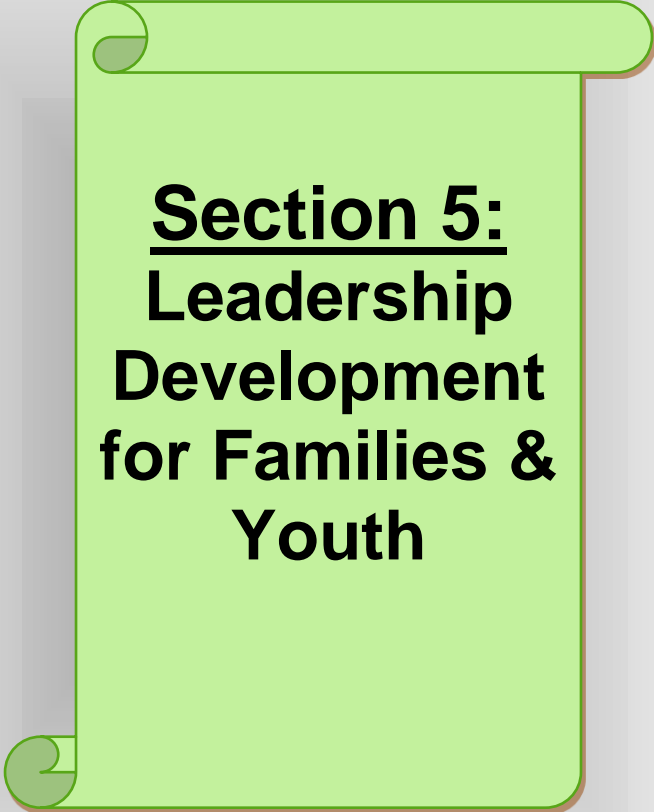
## *Other Resources For Your Board*

- Youth Engagement Training Healthy Communities Coalition of Larimer County www.healthylarimer.org
- Resources to help involve teens in decision making. www.ActforYouth.net
- On-line toolkits available for youth involvement in policymaking, program evaluation and strengthen partnerships. www.TheInnovationCenter.org
- Youth Voice Toolkit: This toolkit is a series of one- and two-sheet publications, that identify a number of innovative practices, and practical considerations and critical concepts that are focused on engaging Youth Voice, particularly among historically disengaged young people. www.freechild.org/YouthVoice/
- Youth Infusion Website: http://youthinfusion.com
- Building Partnerships for Youth
- http://cals-cf.calsnet.arizona.edu/fcs/bpy/
- Freechild Project www.freechild.org/yapartnerships.htm
- Colorado Youth Development Team's Training & Technical Assistance Clearing House, Anne-Marie Braga, Ambraga@cdphe.state.co.us
- Youth Power, Kippi Clausen, Project Director, Bridging the Gap, http://www.unitedwaydenver.org, 303-561-2386
- Healthier Communities Coalition Youth Engagement Training, http://www.healthylarimer.org/ , 970-495-7503
- Colorado Youth Advisory Council. Contact the Council for consultation on legislation effecting youth within specific Colorado regions or having statewide impact, and access to other youth networks and perspectives across issues and systems statewide. Contact Civic Canopy at http://www.civiccanopy.org
- A successful example of youth mentoring can be found with the Association of Alaska School Boards: ASB training programs help instill standards in board members. Their Youth Leadership programs connect young Alaskans with adult mentors and offer opportunities for learning new skills in civics and communication. www.aasb.org/content/partnerships

## *Materials and Examples*
*(available at: http://sparkpolicy.com/fiscalfam_youth.htm)*

- ✓ Youth Skills and Interest Inventory Form
- ✓ Board Assessment: Readiness For Youth Engagement
- ✓ Example Employer Release Form for Youth

# Section 5: Leadership Development for Families & Youth

# LEADERSHIP DEVELOPMENT FOR FAMILIES AND YOUTH

Families in Colorado have had a plethora of training opportunities and an informal peer support network, supported by The Federation of Families for Children's Mental Health, National Association of Mental Illness, Mental Health America of Colorado, Empower and various other agencies, advocates and liaisons across our child and family systems.

Continuing leadership development of our families and youth is essential. It is equally important for the board to conduct regular self-reflection and assessment around its effectiveness in using community input, ensuring families and youth are comfortable to speak up and take initiative on the board is important (Pires, 2002). Feedback from family and youth members on ways to improve communication skills will be valuable in retaining family and youth engagement.

Building leadership is a deliberate process. As many of your current board members may have work experience and post high school education to draw from, some of our family and youth partners may not. Their contributions to the board come from their personal experiences within your system. They may not present as polished as other board members, but have an equal contribution to make to your discussions and decisions.

Family Leaders are invested in the outcomes of their involvement. Involving family members early on in a process and in sharing leadership responsibilities may foster a greater buy-in from the families on your board. Your board leadership may need to change from independent to interdependent, moving to a more collaborative leadership paradigm for board decision-making.

## Leadership Development

Providing leadership development opportunities during and outside board meetings sends the message that:
- Your board is supportive of family and youth leaders;
- You want your family leaders to be successful;
- You want the commitment of family leaders to invest in the board; and
- You want to minimize mistakes and ensure they have clarity of information.

In addition, benefits of training will yield a more competent partner, with less of a need to ask other staff to help them understand concepts or procedures.

In order for your board to have dynamic and involved family and youth board members, your board will need to determine a strategy to build and grow the leaders among you. Some different methods for developing leaders may include (Community Toolbox, 2007):

*"Grass is not greener on the other side. Grass is greener where we water it."*
*- Rabbi Boteach, The Learning Channel*

- *Training as you lead.* Sharing your thinking about what you are doing and why you are doing it can be an invaluable learning experience to someone you are training. This can occur during, before, or after board meetings or as part of one on one mentoring.

- *Mentoring.* Mentoring means you take someone under your wing and teach them one-to-one over a period of time. When you mentor someone, you make a commitment to them. You help them become a leader by teaching them what you've learned and by encouraging them as they take on new challenges. *Your confidence in another person and commitment to them as a developing leader is one of the most effective ways to help them become a leader*.

- *Orientations.* Whenever a new person becomes part of your board, an orientation is important to help the person get on-board quickly. It is important to assist new members by giving them a broad understanding of how the board operations tie in to the agency mission and vision. People want to feel that they are doing a good job, and they need the information and training in order to do their jobs well. Giving people the help they need early on is a worthwhile investment. If people are left on their own when they first begin, they can often feel left-out or resentful.

- *Workshops.* Workshops can help your whole group move forward on key issues. Perhaps your board needs a workshop on decision-making, fundraising, or creating an action plan. Having a workshop that addresses key issues will align your board and build capacity as all board members, including family and youth members, increase their knowledge of the issue. If the workshop solves a long-term problem, it also has the potential of lifting morale and renewing commitment.

- *Retreats.* Retreats can be excellent for revitalizing or refocusing our board and identifying new goals or plan new strategies. A retreat can also be used when the board is poised to take a new direction and when it is necessary for everyone to understand the coming changes in order to make the change successful. Retreats can help people recommit to the board's mission. They can also help people

remember the importance of their relationships to each other as they work together. All of these are important activities for families and youth to experience and help inform as they build their leadership skills.

- *Developing an individual leadership plan.* People often need persistent encouragement to lead. Your board chair or identified mentor can meet with the family or youth member about their leadership development goals. Ask them to brainstorm ways in which they would like to make contributions and what leadership skills they would like to learn.

Professional development such as leadership training requires a certain amount of organizational support, including paying for registration fees, travel, and other expenses associated with attending trainings. At the very least, ongoing training and professional orientation is needed and should be viewed as a board member's commitment. However, we recommend that efforts be made to minimize financial costs for family member's participation. Examples to help your board move forward with leadership training:

1. Develop a professional mentoring program between current board members and family and youth partners. Other boards have had success with a well thought out step-by-step model to meet the needs of new board members leaders.

2. Identify a set of skills you feel new board members need to have in order to contribute to your table. Explore internal training and community training opportunities to enhance that skill set of all new board members including families and youth.

3. Set aside time and money to encourage new family and youth board members to attend training and skills development programs through community groups and local advocacy organizations.

4. Encourage your family and youth board members to participate in a peer support program through your agency, a community organization, or an informal network of advocates within local system partners. This will create additional support outside of your board and staff and contribute the broader development of a family and youth support network in your community.

Regardless of what type of training opportunity is made available, feedback on the training will need to be gathered. The feedback is best used amend the training content

or change the range of training options available to the family and youth members of your board.

Two strategies for obtaining feedback, and the best times for using them, are (Community Toolbox, 2007):

- Group discussions and individual conversations: these are the best ways to get real information. They allow for give and take, and give people a chance to polish their thoughts as they hear those of others.

- Surveys: Anonymous or confidential surveys may be somewhat less revealing, but they may also give you accurate feedback on how helpful and interesting your training is. The important questions are whether participants feel that the training program, in general, was useful, and how it can be improved. Obtaining honest feedback could be difficult if the level of trust on the board is not high and surveys may be the best tool in these situations.

*Financing Leadership Training:* Joining with other organizations with similar needs to conduct joint trainings may be a practical way to finance training and ongoing support. When none of the organizations alone has the staff or financial resources to conduct a full-fledged training program, this can be a great way to provide high-quality professional development for family, youth, and other board members.

## *Opportunities for Leadership in Board Activities*

One way to develop leadership capacity is to ensure the board environment is comfortable for all members, as discussed in previous chapters. Once these criteria are met, there are many ways to enhance leadership of your family and youth partners or any new board member, such as:

- Foster personal initiative. When someone suggests trying a different procedure, for instance, encourage the person to experiment with it. If it works well, recognize the owner of the idea. Don't let new board members feel like their ideas are never accepted, or taken without credit;
- Apply board policies equally to everyone;
- Involve new board members in major board decisions and problem-solving sessions;
- Be sure your board allows for advancement of family and youth to help foster a sense of pride and self-worth, and to recognize the fact that experience helps people improve their work;

- Have a mechanism to give regular feedback to new board members regarding their work. This may include oral or written feedback such as regular evaluations;
- Make sure that everyone in the organization gets regular helpful supervision;
- Give the new board members a chance to evaluate the board chair and committee leads, either personally or anonymously; and
- Criticize privately and praise publicly.

Recognize work that is well done. This may be done in a variety of ways, including (Community Toolbox, 2007):
- A "Family – Youth Advocate of the Week" column in a board or agency newsletter;
- A recognition of achievement at board meetings with cake, card, or other perks;
- Nominations for awards;
- Thank you notes; and
- Assigning tasks that will challenge families, youth, and other board members, and allow them to shine.

## *Example Leadership Materials and Trainings*

Your board does not need to create its own leadership training!  Colorado already has many excellent opportunities for families and youth to learn leadership skills, develop a network of peers, and continue to be involved in advocacy opportunities outside your board.  There are opportunities available as of December 2009 at:
- Family Leadership Training Institute, hosted by Parent to Parent, Cerebral Palsy of Colorado, www.cpco.org.
- Federation of Families for Children's Mental Health ~ Colorado Chapter. http://www.coloradofederation.org/
- Parent Leadership Training Institute, hosted by the Colorado Department of Public Health and Environment, Eileen.Forlenza@state.co.us
- Opening Doors to Leadership, hosted by the Triad Early Childhood Council, www.frcce.org/triad.as .
- Learn how to serve on Advisory Councils and Boards: Understand the Role of Family Leadership in Public Policy, Association of University Centers on Disabilities, www.aucd.org/template/index.cfm
- Grassroots Training on legislative processes, hosted by Mental Health America, www.mhacolorado.org
- Advocacy Training for People on the Go!, hosted by the Children's Hospital. Children don't know politics, but every day they are affected by public policies and laws.  It's up to adults to speak up and make sure those policies and laws are
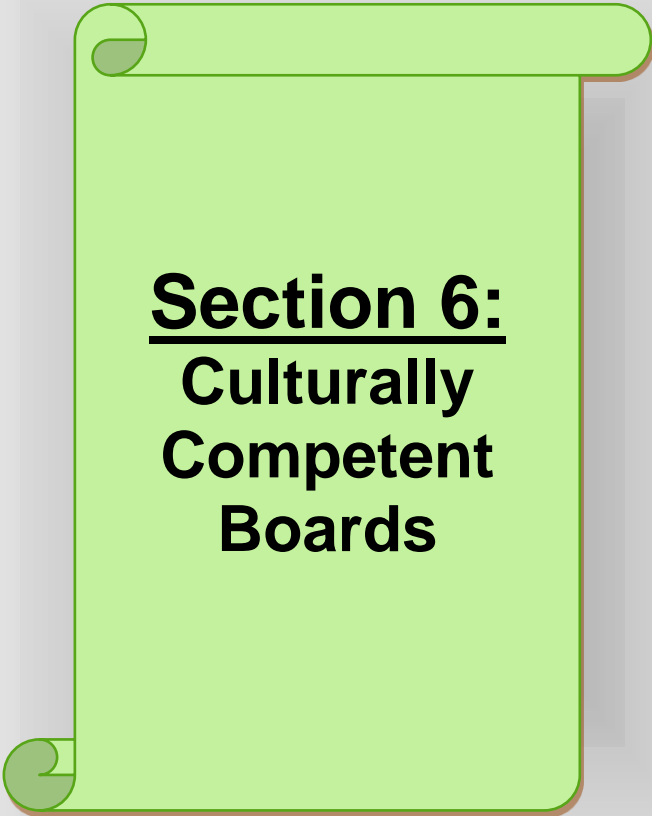
good for children's health and well-being.   http://www.thechildrenshospital.org/advocacy
- Leadership Development Training, hosted by the Federation of Families for Children's Mental Health ~ Colorado Chapter, www.coloradofederation.org

In addition to training opportunities, peer support is available through:
- PEAK Parent Center – Helping Families Helping Children, www.peakparent.org
- Technical Assistance Alliance for Parent Leaders: Parents as Collaborative Leaders.  http://www.ecac-parentcenter.org/about/projects.htm
- Federation of Families for Children's Mental Health, Colorado Chapter, www.coloradofederation.org
- Smart Start Colorado, www.smartstartcolorado.org
- Family Voices of Colorado, www.familyvoicesco.org
- Empower Colorado, www.empowercolorado.com
- Parent to Parent of Colorado, www.p2p-co.org
- Colorado Parent Coalition, www.coparentcoalition.org
- Peer Specialist Training, Community College of Denver, part of the Human Services Certificate Program. http://www.peertraining.com/applications_&_updates.htm

# Section 6:
## Culturally Competent Boards

# CULTURALLY COMPETENT BOARDS

Public policy and governance boards often make decisions that will have an impact on individuals from many different backgrounds. Over representation of minorities in public service systems indicate diversity in service population and a need to ensure your board is culturally competent with broad diversity.

This chapter will define diversity and cultural competence and why they are important for your board. It will outline strategies for recruiting diverse families, youth, and other board members. Once you have a diverse board, maintaining and sustaining the diversity takes commitment.

The chapter includes:
- Steps in building a culturally competent board;
- Common barriers;
- Strategies;
- Cultural competence continuum;
- Roles in ensuring a culturally competent board; and
- Resources for more information.

## *Building Cultural Competence on a Board*

A first step in prioritizing cultural competence is recognizing, as a board, that having the respect and trust of the communities' affected by your board's decisions is critical to creating culturally competent policies. The approach of incorporating a community member into the board's decision-making structure allows the board to draft policies that are sensitive to the needs of diverse communities.

On a broader level, cultural competence requires that boards:
- Have a defined set of values and principles;
- Demonstrate behaviors, attitudes, policies and structures that enable them to work effectively across cultures;
- Take actions, such as conducting self-assessments, acquiring and institutionalizing cultural knowledge, and adapting to the diversity and cultural contexts of communities;
- Incorporate the above into all aspects of policymaking and implementation; and
- Systematically involve consumers, key stakeholders and communities.

However, developing culturally competent boards is not a seamless process. It is important to be able to recognize some of the key barriers to achieving culturally competent boards. Barriers, specifically those relating to inclusion, awareness, and the need to change and adapt, may be intentional or unintentional. Common barriers include:

- The presumption of entitlement;
- Systems of oppression and historic trauma;
- Unawareness or unwillingness of the need to adapt;
- Historic distrust and misperceptions between different groups;
- Defining issues as black and white;
- Personal baggage that is brought to the situation;
- Differences in perspectives;
- Differences in talking about sensitive issues.

*Training on Cultural Competence:* One key tool in addressing cultural bias is diversity training. Diversity training is training for the purpose of increasing participants' cultural awareness, knowledge, and skills. It is based on the assumption that the training will benefit a board by protecting against civil rights violations, increasing the inclusion of different identity groups, and promoting better teamwork.[1]

Each of us looks at the world through filters that are developed based on our own unique experiences. Diversity training helps us learn about those filters and how they impact decisions, work styles, and personal relationships. Diversity training can be provided by an outside organization that specializes in diversity training or by a board member who has expertise in the area.

*"For" vs. "With":* Boards that value cultural competency are always striving to ensure that the policies they work on are culturally competent. A common, but ineffective, approach to creating culturally competent policies is doing the work *"for"* the various communities of focus. This approach ignores some of the key concepts of cultural competency.

Doing work "for" the community is common for a number of reasons. First, it requires no new skills. Second, it allows one's board to stay inside its comfort zone rather than leaving the comfort zone to engage with folks who we perceive to be different from us.

The second approach is to work *"with"* the communities of focus. Working "with" the communities of focus will, in the long run, create far more effective policies. This more collaborative approach aligns with a major principle of cultural competence and community engagement – the recognition that communities determine their own needs.

*Strategies for Building Cultural Competence:* Once you have assessed your board's level of cultural competency, you may need to access a number of strategies to support board / organization learning and abilities toward cultural proficiency:

- Employ consultants and consumers with expertise in cultural and linguistic competence.
- Partner with local community organizations and agencies representing cultural groups
- Develop and disseminate materials that are adapted culturally and linguistically.
- Actively pursue resource development to continually enhance and expand the Board's capacities in cultural and linguistic competence.
- Advocate with, and on behalf of, populations who are traditionally un-served and underserved.
- Establish and maintain partnerships with diverse constituency groups to eliminate racial and ethnic disparities.[1]

## *Understanding Diversity and Cultural Competence*

Traditionally, many boards and systems operate without the formal input from the people that benefit.  In a diverse environment there are alpha groups (dominant or mainstream) and beta, or minority groups. People who are in an alpha group are often unaware of the advantages they may have because the cultural rules benefit them.

Cultural competence is the ability to understand, communicate, and interact effectively with people of different cultures.[1]  The culture of a family – such as habits, traditions and foods for example, is another consideration for boards. Cultural competence skills can be applied to individuals, organizations and volunteers (i.e., advocates, board members, etc.)  There are four components to cultural competence:

1. Awareness of one's own cultural worldview;
2. Attitude towards cultural differences;
3. Knowledge of different cultural practices and worldviews; and
4. Cross-cultural skills.

A diverse board includes variance of culture, gender, opinion and perspective. This diversity will ensure a consistent influx of ideas. It is widely recognized that addressing communication and tensions between different groups within your board will improve the overall functioning of your board and result in better teamwork.

As your board begins recruiting diverse families and youth, don't forget that diversity in this context and throughout this chapter means much more than mere race—it means

whatever demographic groups are present in the community of focus. This could mean a group as narrow and specific as people with a particular mental illness to a group as broad as women, or young people.

## *Diversifying Board Membership*

Discuss the culture of your group. What are the group norms? How flexible are those norms as new members are brought on. Your board may want to review these norms as part of bringing on new members to ensure an equal voice for all members by being open to needed accommodations to group 'rules'.

The following are strategies to increase diversity in board member recruitment and retention efforts:

- Develop relationships with organizations that cater to the needs and interests of minority and other diverse candidates;
- Participate in diversity awareness training. By participating in diversity training, you can better appreciate the individuality of each and every board member;
- Ensure that your board has a development plan. Having a written development plan will help maximize the board's opportunities to develop cultural competence and attract diversity;
- Communicate key competencies and attributes for success. Potential board members may be unfamiliar with exactly which competencies and attributes are needed to assume positions with increased responsibility;
- Support board members and potential board members in taking advantage of developmental opportunities and make diversity an explicit component of individual leadership development.
- Provide board members an opportunity to be mentored;
- Provide opportunities for formal and informal networking;
- Acknowledge that a diverse and inclusive environment is both realistic and complicated and takes time;
- Develop and deliver a formal presentation on diversity to internal audiences. It's important that your board see and hear discussions of diversity issues;
- Talk about diversity in regular board meetings. It's important that diversity is integrated into the typical operations of the board; and
- Involve visibly diverse board members in outreach efforts.

When diversifying a board, it is important to consider the purpose: it is a good idea for the board to represent the diversity of the individuals affected by the board's decisions. If the board has committees, leadership roles, or other structures to divide up the work, diverse representation needs to be throughout these structures as well.

Once a board has achieved diversity, it is important to know how to manage that diversity to optimize its benefits. Managing diversity focuses on maximizing opportunities for all board members to contribute, enhancing the cultural competence of its policies. Boards need to continually reassess their ability to meet this challenge and may appoint a 'Diversity Officer' to provide this oversight.

Active board leadership and modeling will ensure that the board is a comfortable place for people from diverse backgrounds, ethnicities, and cultures. A Diversity Officer may be appointed and/or board leaders take active measures to interrupt the stereotyping, jokes, rumors and other sorts of behaviors that can set the stage for more harmful expressions later on.

When boards ensure that diversity is valued and effectively managed, they can:
- Build better relationships between members;
- Improve decision-making by promoting an open forum for disagreement among members;
- Stimulate effective team building;
- Expand the ability to change problems into opportunities;
- Promote creativity and innovation;
- Increase board member initiative, camaraderie and morale; and
- Reduce conflict among members.

## Individuals and Cultural Competence

Your board may already have individuals who are culturally competent and can serve as *cultural brokers*. Cultural brokers are aware of their own cultural identity, the cultural identity of members of a diverse community or communities, and the social, political and economic factors affecting diverse communities within a particular cultural context. Cultural brokers link, or mediate between groups or persons of differing backgrounds for the purpose of reducing conflict or producing change. (Minnesota Council of Non-Profits Governance Basics, n.d.)

Cultural Brokers may be able to:
- Take a leadership role in supporting all board members as they increase their cultural competence.
- Mentor family or youth board members who are from diverse backgrounds to help them acculturate to the board. The mentor will walk the new member through the structure, protocol and requirements of the board.

- Educate board members on how best to enhance policies to be culturally competent and inclusive to meet the needs of those the policy is intended for.

The skills of a cultural broker on your board might include:
- The ability to facilitate self-assessment and process among board members regarding diversity and cultural competency
- An understanding of the values, beliefs and practices associated with illness, health, wellness, and well-being of the cultural group;
- Knowledge of the traditional or indigenous health care networks within a diverse community;
- Knowledge of the medical, health care, and mental health care systems;
- The ability to communicate in two or more languages;
- The ability to interpret and/or translate information from one language to another;
- Knowledge to Interpret and translate the vernacular of the board
- The ability to mediate and manage conflict.

## *Community Associations*

The following list includes Community Associations that have worked hard to advocate for culturally competent practices and lobby for the rights of diverse constituents. Their websites have good suggestions for developing and maintaining cultural competency and equal opportunity administrative practices.
- National Center for Cultural Competency, Georgetown University. http://www11.georgetown.edu/research/gucchd/nccc/
- National Urban League. The National Urban League has a study and report called Diversity Practices that Work. This study of more than 5,500 American workers provides new data on the effectiveness of diversity programs. http://www.nul.org/content/diversity-practices-work-american-worker-speaks
- National Organization on Disability. The National Organization on Disability has an excellent set of tips for successful meetings with interpreters. http://www.nod.org/index.cfm?fuseaction=Feature.showFeature&FeatureID=1075

## *Other Resources for Your Board*
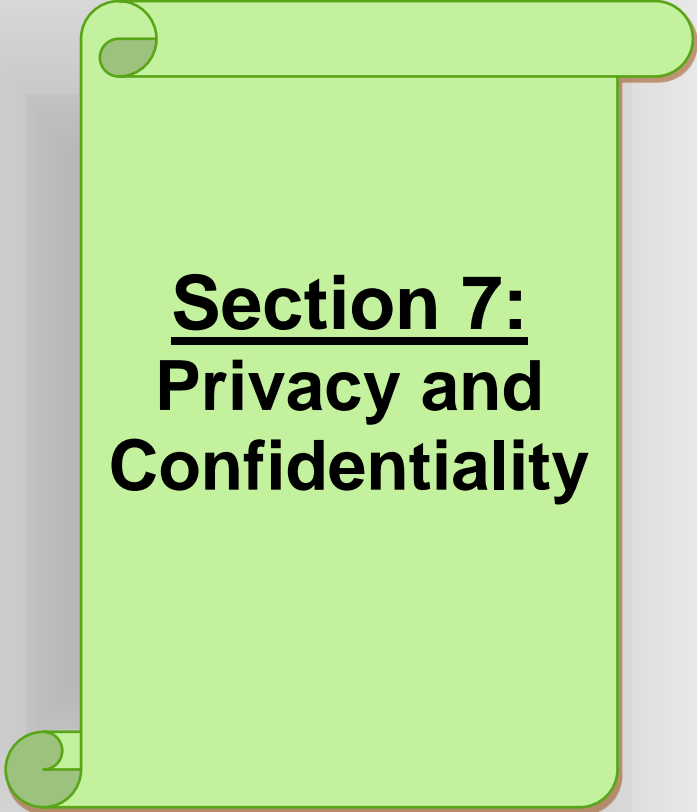
- Colorado GLBT Bar Association, http://www.coloradoglbtbar.org/, Attorney Referral Hotline: 303-282-6524
- Gill Foundation, http://www.gillfoundation.org/, 303-292-4455
- Gay & Lesbian Fund for Colorado, http://www.gayandlesbianfund.org/, 719-473-4455

- Asian Pacific Development Center, http://www.apdc.org, 303-393-0304
- Servicios De La Raza, http://www.serviciosdelaraza.org/, 303-458-7088
- Colorado Development Disability Council, http://www.coddc.org/, 720-941-0176
- Denver Indian Family Resource Center, http://www.difrc.org/, 303-871-8035
- Colorado Department of Human Services Division of Supportive Housing & Homeless Programs, http://www.cdhs.state.co.us/shhp/Homeless-Youth.htm, 303-866-7350
- Colorado Coalition for the Homeless. http://www.coloradocoalition.org/, 303-293-2217
- The Center for African American Health. http://www.caahealth.org/page.cfm, 303-355-3423

## *Materials and Examples*

*(available at: http://sparkpolicy.com/fiscalfam_youth.htm)*

✓ Commitment to Diversity Checklist
✓ The Cultural Proficiency Continuum
✓ Cultural Competence Self Assessment
✓ Cultural Competence Discussion Guide

# Section 7:
# Privacy and Confidentiality

# PRIVACY AND CONFIDENTIALITY

Staff who provide health, mental health, and substance abuse services to individuals and families have to abide by both federal and state client confidentiality clauses. Volunteer boards of such service providers are held accountable to the same client confidentially standards as the organizations they serve. There is, however, a great deal of confusion over what those state and federal confidentiality clauses stipulate. This section clarifies privacy requirements, their implications for board discussions, and strategies for ensuring appropriate protection of privacy at board meetings.

## *The Impact of the Health Insurance Portability and Accountability Act*

HIPAA (the federal Health Insurance Portability and Accountability Act), one of the most well known of the Federal Acts that has specific privacy rules regarding a client's health information, is often cited as the reason why a board may want to have a closed door discussion. For example, volunteer boards may suggest that a family or youth participant on a board leave the room in order to discuss scenarios or strategize on best practices that include identifiable client demographic data.

Is HIPAA or a similar state client confidentiality clause really applicable in this context and, if so, how can one create a structured, standardized approach to protecting client confidentiality that does not exclude the family member consultant on a board?

**HIPAA Defined:** HIPAA (Health Insurance Portability and Accountability Act) is a Federal Act implemented by congress in 1996 with additional amendments over time. Privacy issues arise from the Act's Administrative Simplification (AS) provisions, which provide guidelines for streamlining the administrative aspects of health care administration and information systems. The Privacy Rule protects individuals' personal medical information and includes penalties for non-compliance. These non-compliance penalties include fines up to $250,000 and possible jail time for severe enough violations (Lorenzen, 2006).

**HIPAA's Privacy Rule:** The Privacy Rule defines what is considered *Protected Health Information* (PHI) as individually identifiable health information transmitted by electronic media, maintained in electronic media, or transmitted or maintained in any other form or medium. PHI excludes education records covered by the Family Educational Rights and Privacy Act and employment records held by a covered entity in its role as employer.

*Individually Identifiable Health Information* is a subset of health information, including demographic information collected from an individual, and (NIH, 2007):

1. Is created or received by a health care provider, health plan, employer, or health care clearinghouse;
2. Relates to the past, present, or future physical or mental health or condition of an individual; the provision of health care to an individual; or the past, present, or future payment for the provision of health care to an individual; and
3. Either identifies the individual or there is a reasonable basis to believe the information can be used to identify the individual.

The HIPAA Privacy Rule also states that an individual who believes that their patient confidentiality has been violated can file a complaint with the [Department of Health and Human Services](#) Office for Civil Rights (OCR). However, the majority of complaints reviewed thus far have been closed because the Office for Civil Rights found no violations – demonstrating a widespread misunderstanding of HIPAA privacy stipulations (Francis, 2006).

## *The Impact of Other Privacy Rules and Regulations*

It is important to remember that while HIPAA sets specific guidelines for client confidentiality, service providers also have to abide by both State and other Federal Laws regarding client confidentiality. To understand the privacy implications for your board, it is important to understand that:

- If State Law is more stringent than HIPAA, State Law applies
- If State Law is less stringent, HIPAA applies
- If other Federal Law is more stringent (e.g., Substance Abuse), other federal law applies.

## *Implications for Family and Youth Participation on Boards*

Family members can actively participate in board functions even in the infrequent scenario that confidential health information is being shared.

It is unlikely that a discussion during a board meeting on client or patient cases would include *Individually Identifiable Health Information*. It is far more likely that service practitioners who are working to address a specific client's needs would find themselves in that scenario.

Family members on the board are in no different position than other board members as regards being a recipient of identifiable health information. No board member who is not directly involved with the treatment of the individual in question would have the

right to receive individually identifiable health information. All board members would need to sign a confidentiality waiver or privacy statement initiated by the board.

*Confidentiality waivers.* An Additional insurance of privacy protection is a confidentiality waiver. Volunteer board members sign a waiver stating that a client's *individually identifiable health information* will only be discussed by those directly involved in the patient's care.

Therefore, board family members will not be required to recuse themselves when presented with confidential health information during decision-making discussions. This is also true as it applies to board funding decisions.[1] HIPAA and Colorado confidentiality laws balance protecting an individual's privacy while allowing important oversight functions to continue. Psychologist-client confidentiality does not apply where an exception exists in a privilege statute or a regulatory and oversight board's own enabling act.

Under existing laws, only in situations where actual evidence of board member's high probability of bias exists should recusal be considered.[2] Since other board members' biases do not require recusal, it follows that family members can generally participate actively in board decision-making, funding, and voting decisions.

When a family or youth participant is on the board, another type of privacy issue may arise. Self-disclosure of their personal story may play a role in informing the board discussions. Self-disclosure of personal information does not put boards at risk of violating privacy laws but new policies to protect privacy may be indicated.

The relevance and self-disclosure of the family member's experience presents an opportunity for the board to develop bylaws and meeting norms that support confidentiality and create a safe environment for their family and youth participants to self-disclose.

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[1] If the confidential information belongs to the family member's relative, further precautions may be required. Colorado Revised Statute 27-10-129.5 governing request for release of information, procedures, review of a decision allow treating professionals to determine which information can be released to family members of patients. The treating professional's decision can be administratively appealed.

[2] If the board is primarily an adjudicatory board, a lower appearance of bias may be enough to require recusal. The mental health boards this workbook advises are primarily legislative and oversight boards. Thus, a higher standard of evidence based bias is required for recusal. Where the family member's interest was indirect, remote or minimal such that it could not have influenced their action, the family member may remain an active participant.

## *Strategies for Boards to Maintain Appropriate Levels of Privacy*

*Bylaws, Norms, and Confidentiality*. If a board of a service organization believes that it is necessary to access and share client information because it can help shape and improve service delivery, there are standard steps a board can take that meet confidentiality requirements and that do not exclude certain board members.

1. When discussing confidential health information, it is a good idea for boards to operate under the guidelines applicable to an entity covered under HIPAA. This means:

   a. All board members should be required to sign a *confidentiality form* before joining the board.

   b. The identity of any client whose records are reviewed should not be disclosed to any person not directly involved in the review process; that is, not on the board.

   c. Family and youth members, who will have signed the confidentiality form along with the rest of the board, *should not* to be asked to leave when a board reviews privacy-protected information; in fact, there is no legal basis for doing so.

2. To protect confidential health information discussed at board meetings, boards may hold closed meetings consisting of board members only, inclusive of family and youth board members. It is important that boards also remove from the minutes all names or identifying information.

3. As discussed earlier, client confidentiality is protected by more than HIPAA. Be aware of state, federal, and even funder confidentially clauses and how they apply to the individuals served by the organization;

4. The board can assign one person on the board to be the Privacy Officer. This designee will address confidentiality issues and respond to requests for client or employee information. It is important that the person selected consult with the service provider's legal counsel to seek guidance on particular issues as they come up.

5. When dealing with children, boards of service organizations have an obligation to know who has legal rights to access information about the child. If there is a question about the parental status or rights, ask for documentation from the parents. Even if a parent does not have physical custody of the child, s/he may have the legal right to both view and release a child's records. Determining what information may be disclosed, particularly if it relates not only to the child, but also to the parent, may be difficult and require some investigation of both the facts of the case and the state law.
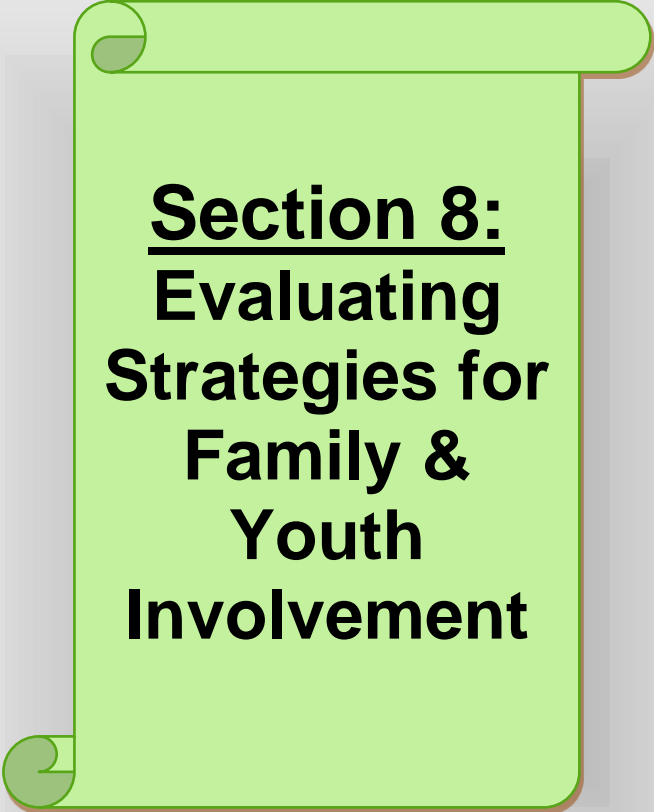
6. The new board, including family and youth members, should be made aware of the full participation of families in policy, funding and program decisions, with any special attention to voting rights as needed. Address any residual rules or procedural board changes not already in place to reflect such inclusion in bylaws.

It is a good idea for service providers to ensure that clients understand and agree to the organization's confidentiality policy. One way to do this is to include an acknowledgement, signed by the client, on the initial intake form. We recommend that organizations develop a standard form that a client can sign that specifically states the client understands that the information may be released to other parties.

## *Materials and Examples*
*(available at: http://sparkpolicy.com/fiscalfam_youth.htm)*

✓ Example Confidentiality Statement

# Section 8:
# Evaluating Strategies for Family & Youth Involvement

# EVALUATING STRATEGIES FOR FAMILY AND YOUTH INVOLVEMENT

Authentic family and youth participation takes time and resources, as well as a commitment from board members.  To sustain participation as board membership changes over time, it may help to have ongoing information about what works, what does not work, and how to improve.  To collect this information, boards can undertake two activities:

- Evaluation: conducting periodic evaluations of the participation process and using the information to revise bylaws, norms, recruitment materials, and other documents and processes that are creating barriers to authentic participation; and
- Board mentoring: identifying and working with another board that has more experience with engaging families and youth in authentic participation.

## *Evaluating Participation*

Evaluating family and youth participation helps to understand whether the participation is working, both from the perspective of board members and the impact it may be having on the decisions made by the board.  Two types of evaluation are important.  First: evaluating the participation process, which you can do through a *process evaluation*.  Second: evaluating the outcomes of having participation on your board, which you can do through an *outcome evaluation*.

*Process Evaluation of Participation on Boards.* A process evaluation's main purpose is to describe how participation is occurring on the board.  It will help you measure the level of participation, consistency in participation, and activities where participation is occurring.  Some process measures you can collect to track participation on your board include:
- What types of families, youth, and other board members are participating on the board? (gender, race, age, county of residence, perspective, etc).
- How many meetings were held and how many family, youth, and other board members attended?
- How many orientation meetings were held and who participated?
- What materials were developed to support family and youth involvement, and who received them?
- How many decisions were made with family and youth participation involved?
- What kinds of decisions have been made with family and youth participation?

*Outcome Evaluation of Participation on Boards.* An outcome evaluation's main purpose is to help the board understanding how participation has had an impact on the board's decisions and board members' experiences. It may examine changes in knowledge, skills, attitudes, and perspectives of board members. It could also ask about board members satisfaction with the participation process. Finally, outcome evaluations can track discussions leading up to the decisions made with and without family and youth participation, helping to see how their involvement may change the decisions. Some outcome measures a board can collect include:

- How have board members attitudes toward and knowledge of family and youth participation changed over time?
- Are board members, including the families and youth, satisfied with the participation occurring?
- How do the decisions made with family and youth participation differ from those made without?
- What are the issues that families and youth bring to the forefront prior to decision-making?

*Designing and Implementing an Evaluation of Participation.* It is best to design the evaluation at the very beginning of developing family and youth participation on your board. Having an evaluation plan in place at the beginning of youth and family participation ensures an ability to track changes throughout the time of participation. However, evaluation can be useful at anytime, and we recommend that boards that already have participation still consider evaluating their participation activities. Designing your evaluation includes identifying the purpose and your evaluation questions and then creating measurable milestones.

*Practical Examples and Evaluation Questions.* To help you generate the right evaluation questions consider the following key elements (Engage Youth!, 2008):

1. For what purpose(s) is the evaluation being done, i.e., what do you want to be able to decide as a result of the evaluation?
2. Who are the audiences for the information from the evaluation, e.g., board members only or other stakeholders involved with the board?
3. From what sources should the information be collected, e.g., youth, family members, all board members, other stakeholders of the board, board staff, etc?
4. How can that information be collected in a reasonable fashion, e.g., questionnaires, interviews, examining documentation, observing board meetings, conducting focus groups among key board members, etc.
5. What resources are available to collect the information?

*Goals and Evaluation Questions.* The first step in to define your evaluation goal. A goal is the overall purpose of the participation process.

> *For example, a goal for a board that deals in youth issues could be: "To ensure decisions on youth programs in Colorado are made in partnership with youth."*

The next step is for the board to identify how it will know the goal is met. Identify the measure of success: do you need to ensure that each decision made by your board has a youth vote? Or is the measure of success that the board took time to discuss and consider the issues brought up by youth before making the decision.

> *Continuing the above example about youth participation, evaluation questions might include:*
>
> - *How many decisions were made with a youth participating as a voting board member?*
> - *How many decisions were made after a discussion that included youth input?*
> - *How many decisions were made that mirrored the recommendations of our youth advisory board?*
> - *Did the youth involved in decision-making feel their voice was represented in the final decision?*

Other evaluation questions might include:
- Are board members satisfied with the level and type of family and youth participation?
- Have attitudes of board members changed because of the participation?
- Do all board activities incorporate youth and family input?

*Defining Milestones.* Your board may then identify milestones or timelines to help gauge success. Milestones need to be SMART: **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-bound. Achievable milestones give your board room to grow. Relevant milestones help you measure your progress on the evaluation questions.

Example *process* milestones include:

- Recruit 5 family members from target populations to participate on board by December 31$^{st}$, 2010.
- Develop orientation materials for the board by December 31$^{st}$, 2010.
- Connect all family members participating on the board to mentors on the board within 2 months of joining the board.

Example *outcome* milestones include:

- 80% of participating family and youth members will report developing new leadership skills.
- 80% of participating family and youth members will report satisfaction with their opportunities to provide input to decision-making.
- 80% of participating board members will report satisfaction with the level of family and youth involvement on the board

**Collecting Information to Answer Your Evaluation Questions:** Once your board identifies milestones, the next step is to identify the types of information you need to collect to measure the milestones.

Start to identify activities to "count" on a tracking sheet (see the attachment for this chapter, Process Evaluation Tracking Sheet, available on the website at http://sparkpolicy.com/fiscalfam_youth.htm, for an example).

Easy milestones to track might include: the number of family and youth members participating regularly, the number of orientation sessions, etc. More complicated milestones to measure may include: satisfaction of family and youth members with their participation, the leadership skills developed by family and youth participants.

Other milestones, particularly those focused on outcomes, may require a survey of board members, a facilitated discussion during a board meeting, interviews of key partners, review of board minutes or other materials, etc.

Below is a table adapted from *Engage Youth! Colorado's Guide to Building Effective Youth-Adult Partnerships* that lists different methods of data collection, their purposes and the types of information they obtain, and the advantages and challenges of each. Since some data collection methods take more time and effort than others, it is a good idea to consider when the evaluation results are needed and what resources are available to collect the information.

## Data Collection Methods

| Method | Overall Purpose | Advantages | Challenges |
|---|---|---|---|
| Questionnaires, surveys, checklists | When you need to quickly &/or easily learn a lot of information from people in a non-threatening way. | • Can complete anonymously;<br>• Inexpensive;<br>• Easy to compare & analyze;<br>• Can get lots of data;<br>• Can administer to the entire board; &<br>• Many existing sample questionnaires. | • Might not get careful feedback;<br>• Doesn't get full story;<br>• Can be impersonal;<br>• Wording can bias board member's responses; &<br>• Literacy & language barriers. |
| Interviews | When you want to fully understand someone's impressions or experiences, or learn more about their answers to questionnaires. | • Get full range & depth of information;<br>• Develops relationship between interviewer & interviewee; &<br>• Can be flexible. | • Can take much time;<br>• Can be hard to analyze & compare;<br>• Can be costly; &<br>• Interviewer can bias responses. |
| Documentation review | When you want impressions of how program operates without interrupting the program; from review of applications, finances, memos, minutes, etc. | • Get comprehensive & historical information;<br>• Information already exists; &<br>• Few biases about information. | • Info may be incomplete;<br>• Need to be quite clear about what you're looking for; Often takes much time; &<br>• Not flexible means to get data as data is restricted to what already exists |
| Observation | To gather accurate information about how a program actually operates, particularly about processes. | • View operations of a board as they are actually occurring; &<br>• Can adapt to events as they occur. | • Can be difficult to interpret observed behaviors;<br>• Can be complex to analyze;<br>• Can influence behaviors of board members; &<br>• Can be expensive. |
| Focus groups | To explore a topic in depth through group discussion, e.g., about reactions to an experience or suggestion, understanding complaints, etc. | • Quickly & reliably get common impressions;<br>• Can be efficient way to get range & depth of information; &<br>• Can convey key information about board member experiences. | • Can be hard to analyze responses;<br>• Need good facilitator; &<br>• Difficult to schedule 6-8 people together. |

## *Strategies to Respond to Evaluating Findings*

Evaluation is only useful if the results help to improve your board's family and youth involvement strategies. Once your board has the results, it is important to share them with all board members including the families and youth participating on the board. Setting aside time at a board meeting to present, discuss, and act on evaluation findings is one strategy for using the information. At a minimum, it's a good idea for your agenda for this activity to include:

- A short presentation of the process and outcome evaluation findings;
- A discussion of what the findings indicate about your boards current efforts and their success;
- A discussion of what your board would like to improve upon in the future; and
- Decisions on concrete steps to take to improve.

Evaluation results are sometimes hard to hear, particularly when they include negative findings. It is important to prepare your board to accept critical information by treating the findings as an opportunity for improvement, not a judgment of their efforts. The language you use when you present evaluation findings can set this tone. Presenting evaluation results does not need to be one person's responsibility on the board. Families and youth, board members who have taken on mentorship positions, or an external evaluator may all help in the presentation of results.

## *Seeking Mentoring from Boards with Sustained and Successful Participation*

In response to any gaps and needs identified by evaluation efforts, your board may want to seek mentoring from a board with more established family and youth members.

Throughout this guide, example materials are presented from other Colorado boards. The materials used and contact with representatives from those boards can be good resources. Additionally, boards like the Colorado Mental Health Planning and Advisory Council (MHPAC) have long-term participation strategies and reimbursement practices. Some groups, like the Collaborative Management Program, have both family participation on their Steering Committee and a subcommittee focused on family participation, called the Voice and Choice Committee. Other groups, like the Youth Partnership for Health (YPH), are composed entirely of youth or family members.

Family and youth organizations can also be helpful, such as:
- The National Alliance for the Mentally Ill (NAMI), http://www.nami.org/
- Mental Health America (MHA), http://www.nmha.org/
- The Federation of Families for Children's Mental Health ~ Colorado Chapter (FFCMH~CC), http://www.coloradofederation.org/.
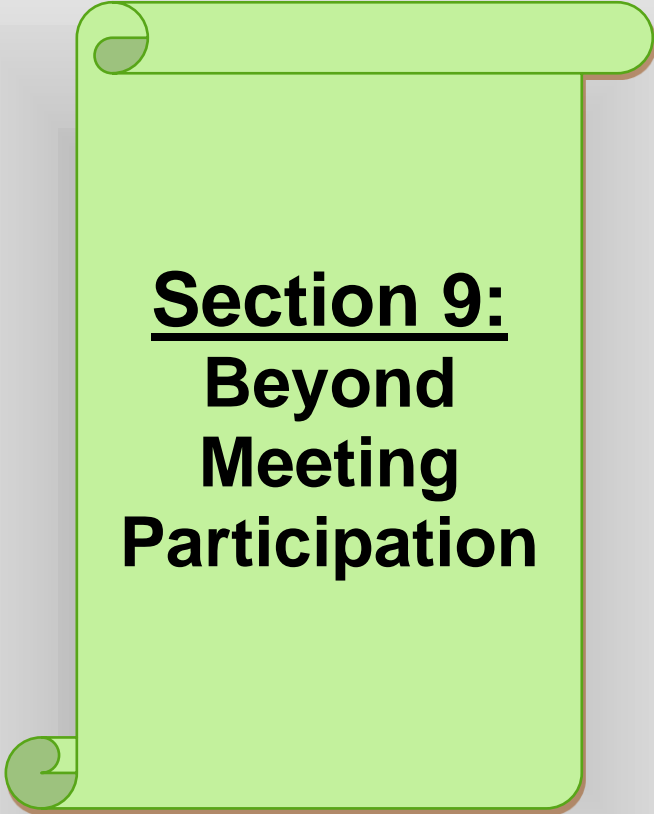
In Colorado, NAMI, MHA and MHPAC are leaders in family involvement on boards. Your board may benefit from consultation with them to learn successful strategies they have used in sustaining family involvement and crafting policies to institutionalize the effort.

## *Materials and Examples*
*(available at: http://sparkpolicy.com/fiscalfam_youth.htm)*

- ✓ Example Process Evaluation Tracking Sheet
- ✓ Example Board Member Satisfaction Survey
- ✓ Discussion Guide on Family Involvement

# Section 9:
# Beyond Meeting Participation

# BEYOND MEETING PARTICIPATION

There are huge benefits to engaging your service population in policy and program decisions. However, while your board may recognize the need to increase family and youth involvement in policy decisions but may not be at a readiness level to begin that immediately. There are other steps your board and agency can take now to recruit actively, acknowledge, and utilize the perspective of consumers on your services.

It is important to remember that bringing on a family or youth board member before your board is ready can be more challenging than it needs to be. Therefore, properly identifying steps based on your board's readiness is a prudent choice in moving this effort forward.

1. Understanding alternative ways to engage families and youth
2. Focus groups and key informant interviews with families and youth
3. Surveys
4. Ad Hoc Committees
5. Advisory Council or Committee
6. Going to the families and youth
7. Using existing infrastructure to access family and youth input
8. Using technology to access family and youth input
9. Example Materials

These strategies can supplement the family and youth members on your board. You may find that a combination of options will be best for your board. *These strategies are also important for boards with active involvement already underway, as they expand the diversity of family and youth voices included in a decision-making process.*

Barriers to boards receiving family input:

- Feedback provided at the grass-roots practice level does not make it to the board level;
- There is no structure in place for the board to receive service level consumer suggestions;
- There is no designated person or resources associated with cultivating this perspective; and
- Fear of retribution if not positive feedback
- This is not a board priority.

Suggestions for board level engagement from service level consumers:

- Dedicate funds to support time and materials for a board designee (see below);

- Provide for two individuals versus only one will provide a consistent voice and a more secure support system
- Establish a board designee (not a service provider or manager), who is tasked with bringing input to the board level and developing a communication pipeline between consumers and the board; and
- Create a regularly scheduled time on the board's agenda to address feedback and response.

Strategies to bring the family and youth perspective to your board include:
- Focus groups;
- Key informant interviews;
- Surveys;
- Ad hoc committees;
- Advisory groups;
- *Hosting casual lunches to dialogue about activities and services*
- Drawing from existing family and youth engagement venues; and
- Using technology to access family and youth input.

## *Focus Groups and Interviews*[3]

Focus groups and key informant interviews are commonly used research strategies for gathering information from families and youth beyond the boardroom. Which strategy you use depends on your goal in gathering information from families and youth, so it is important to have a clear understanding of what you wish to accomplish before setting out. In many instances, you may find it helpful to conduct both kinds of interaction with families and youth, since what you learn from each strategy may inform different aspect of your decision-making. The more richly informed your decisions, the more effective they will be!

*Focus Groups.* A focus group is a controlled group interview of a target audience. The facilitator leading the interview covers a set series of questions or topics. A focus group might provide the opportunity for participants to address any ideas they have for improvements and needed changes. Because the purpose is to learn without bias what the focus group participants think about the topic issue or issues, the facilitator keeps his or her own opinions and experiences private, engages in no analysis, and in general confines his or her role to merely eliciting a discussion amongst the participants. We

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[3] *Health DATA Program – Data, Advocacy and Technical Assistance.* The UCLA Center for Health Policy Research, http://www.healthpolicy.ucla.edu/HealthData/pdf/hd_factsheet.pdf

recommend that translation services be provided when necessary to minimize language barriers.

Focus groups should not be conducted unless resources are also available to compile and analyze the information from the focus groups. Analysis includes reviewing all of the information with an open mind, identifying themes and key examples such as quotes, and reporting the results in a format that is accessible not only to your board, but also to the participants of the focus groups. Finally, it is also important to disseminate the results of the groups to all the participants, so that they can see how the information they provided is being used.

Benefits of focus group sessions include improved perceptions by board members on the issue or issues, better informed decision-making, and a decrease in the kind of misconceptions that can lead to ineffective decisions or slow down your decision-making.

Youth may facilitate a youth focus group – on-line, through a social marketing venue or in person. Youth may be in the best position to gain accurate and telling feedback from other youth.

Primary reasons to use focus groups include:
- The need to collect data, evaluate services, or test new ideas;
- Capture valuable information on perspective of the consumer
- To understand better opinions, beliefs, and attitudes;
- To review and test the assumptions of target audiences;
- To identify gaps between the perceptions of different stakeholder groups;
- To encourage discussion about a particular topic;
- To learn more about a specific topic or business issue; and
- To build rapport with consumers.

*Key Informant Interviews.* A key informant interview is a qualitative, in-depth, one-on-one interview with someone who knows what is going on in the community on a particular issue. Key informant interviews are useful when you are seeking detailed information on a specific topic or when your board wants information that may not be disclosed easily in a group setting.

When conducting key informant interviews, it is important to interview someone from each major stakeholder perspective, so that your results are not skewed by the omission of a major perspective. For example, key informant interviews might be conducted with family members, youth, local service providers, and a family advocate all involved

with the same systems. Key informant interviews can be conducted on the phone or face-to-face.

Just like focus groups, key informant interviews should not be conducted unless resources are also available to compile and analyze the information. Analysis includes pulling themes from across interviews and identifying the areas of disagreement or conflicting views. Reports generated from key informant interviews often include quotes from the participants, with the names and identifying information kept confidential.

Primary reasons to use key informant interviews include:
- To understand the motivation and beliefs of community residents on a particular issue;
- To get information from people with diverse backgrounds and opinions and be able to ask in-depth and probing questions;
- To discuss sensitive topics, get respondents' candid discussion of the topic;
- To get the depth of information you need from individual or small group discussions (two to three people maximum);
- To create a comfortable environment where the interviewee engage with you in a frank and open discussion;
- To get more candid, in-depth answers about an issue; and
- To explore ideas about changes needed and strategies to accomplish such changes.

*Focus Group, Key Informant Interview, or both?* In the ideal situation, both are generally best, but ultimately it depends on your goal in gathering information from families and youth. The focus group dynamic may prohibit you from candidly discussing sensitive topics or getting the depth of information you need. Sometimes the group dynamic can prevent some participants from voicing their opinions about sensitive topics. On the other hand, a one-on-one key informant interview engages just one person's perspective at a time, so you may miss the kind of insight that comes from the group discussion dynamic.

*Ensuring confidentiality / anonymity.* Depending on the nature of the topic, you may need to let key informants and focus group participants know that you will not use their names or any other potentially identifying information in the resulting final report or recommendations. You will want to assure families and youth that their responses will be kept confidential, and that the results will focus on the content of the discussion rather than identifying who said what. Confidentiality whenever possible may

encourage participation, open dialogue, and the expression of true opinions more freely.

## *Surveys*

Traditional methods of determining mental health consumer needs tend to be based on professional input only, which can inhibit good policy development. While progress on addressing mental health consumer needs has been achieved when shared goals have been identified, it has also been hindered by the lack of known areas of consensus between stakeholder groups. Establishing *both* shared goals *and* areas of consensus between stakeholder groups greatly increases the chance that a group of diverse stakeholders will be able to move forward effectively.

Surveys can be a cost-effective method of discovering and documenting shared views from those stakeholders with the greatest stake in the size and direction of the mental health service system. Identifying shared views is necessary to coordinating stakeholder efforts—-it allows you to create a solid, agreed-upon set of assumptions on which to base discussions of new efforts or policies.

Surveys can be created and conducted online using sites like Survey Monkey, or in person or by mail using paper surveys, or through a combination of both. Soliciting survey-takers can be shared amongst board members so as to maximize their contacts. Surveys also provide a method for collecting information and opinions from people you might otherwise not have ready access to, like rural residents and consumers.

Survey questions can be leading or misleading; an important step in any surveying process is to review the questions with a few individuals who have not been involved in its development. Ask them how they interpret the question to ensure you haven't narrowed the answer to the one thing you want to hear, or led the respondent to an entirely different type of information than you hoped to capture. Once survey data is collected, analyzing the information is an important step to be conducted by someone who understands how to compare data to develop findings. Final survey reports can include the basic counts (how many people said what), but ideally also include analysis (percent of families members who agree, compared to percent of youth).

Benefits of surveys include:
- Finding areas of consensus;
- Identifying areas of divergent opinion;
- Providing anonymous input;
- Helping to prioritize services;

- Detecting training needs; and
- Enhancing and coordinating advocacy efforts.

## *Ad Hoc* Committees

Ad hoc committees are generally formed to address a specific problem or task. Usually these committees are established for a set period of time for the purpose of temporary oversight of an issue or a review of the standing rules or policies of an organization, program, or system. An ad hoc committee may have, in some cases, a long term or indefinite duration of existence. In these cases, an initial workgroup, committee, or forum may transition to a more permanent committee.

An ad hoc committee could be used to vet your board's proposals related to family and youth concerns prior to finalizing them. You could also establish an ad hoc committee to take an existing set of proposals and adapt them to fulfill better the needs of families and youth. If your board plans to conduct focus groups, key informant interviews, or surveys with families and youth, an ad hoc committee that has family and youth participation might help in designing a successful process.

Benefits of an Ad Hoc Committee include:
- Flexibility in duration: time limited or a longer-term extension;
- It may be easier to get a meaningful commitment to something that is time-limited;
- Issue or program focused;
- Provide oversight over a particular and well-defined set of proposals or processes; and
- Targeted input.

## *Advisory Councils or Committees*

An advisory council is a group of people who have been appointed by a board of directors or other governing body to provide general and specific advice, perspective, and direction on current and future issues. This is a more formalized, permanent structure than an ad hoc committee and has the capacity to offer input on a broad array of topics, issues, programs, and policies. Just as with boards, Advisory Council members may serve on a permanent basis or for a set term, to be replaced by someone else who can represent their area of interest when their term expires. Changes in membership can provide a regular source of new perspectives and devotion to the work. In addition, because membership generally turns over on a rolling basis, continuity of effort and results can be maintained and improved over time.

An advisory council specifically composed of all families, all youth, or some mix, may create a safer and more accessible environment for families and youth to have in-depth discussions of policy issues. The use of an advisory council, rather than one time focus groups, allows for increasing knowledge among participants of the policies they are asked to inform. This capacity is important when complex and interconnected policy issues are being addressed by the board.

Benefits of an Advisory Council include:
- Works to find consensus on policies and programming to bring to the Board of Directors or governing body;
- Functions under specific policies and procedures;
- Ability to provide input on numerous issues;
- Capacity to be long-term; and
- Can help to align multiple board projects and policies.

## *Going to the Families and Youth*

To increase your likelihood of getting substantial family and youth involvement in your surveys, focus groups, and key informant interviews, approach families and youth where they already congregate. For example, you can solicit youth to participate in your surveys, focus groups, or key informant interviews at:
- Schools and after school programs;
- Skate parks and other youth activities; and
- Stores and restaurants that youth frequent.
- Clubs such as 4H or Junior achievement

Solicit adult participation through:
- School meetings and events;
- Grocery stores and other service settings;
- Child care centers;
- Support groups;
- Health, mental health, oral health, and wellness service organizations;
- Cultural brokers and contacting folks well thought of in the community
- Contact churches and other faith based organizations
- Soliciting to other similar non-profit organizations for participants

Engaging providers and staff in each of these settings to make personal invites can be a very effective way of increasing participation in your survey, focus groups, or key informant interviews.

## *Using Existing Infrastructure*

Colorado has benefitted from multiple federal, state, and local initiatives that have brought together diverse stakeholders and expanded advocacy efforts. Through grants and the will of communities, the infrastructure of Colorado's behavioral health advocacy network and its attention to the input of families and youth is expanding statewide.   Using the existing network of resources of youth, family and consumer advocacy organizations and forums can greatly increase the input and feedback you get from families and youth.

This network includes such things as:

- Policy boards and other committees that already have family and youth participation;
- Family run organizations with trained advocates;
- Community organizations or committees driven by family and youth leaders;
- Support groups for and run by families and youth;
- Public health and preventative/wellness healthcare sites; and
- Leadership academes for families and youth that have emerging leaders eager to participate in policymaking settings.
- The Colorado Youth Advisory Council (COYAC), primary purpose is to "examine, evaluate, and discuss the issues, interests, and needs affecting Colorado youth now and in the future and to formally advise and make recommendations to elected officials regarding those issues." (HB 08-1157) Youth from anywhere in the state are eligible, although there is a preference for youth from rural areas for those positions. To view a map of the Colorado Senate districts visit: http://comaps.org/cosenate.html

Approaching groups like this for feedback and input will:

- Eliminate barriers to participation;
- Provide valuable perspective to ensure activity success
- Engage consumers in a comfortable and familiar environment;
- Prove your interest in their work;
- Acknowledge that you value their time and recognize their effort;
- Maximize the likelihood of a high response rate; and
- Capitalize on already-invested stakeholders.

The Federation of Families keeps a list of advocates, contacts, organizations, and support groups, organized by county, on their website.  To access it, go to: http://www.coloradofederation.org/sup.html

Also find resources through EMPOWER Colorado and Family Voices Colorado: www.familyvoicesco.org

## *Using Technology*

The web and other multimedia methods are an important, emerging tool for building healthy, supportive communities. They may also be useful for engaging youth and family input. The World Wide Web has one tremendous advantage over other methods for youth in that youth are already fluent in the language and culture of the internet—it is an enormous "market" just crying out to be tapped effectively. And adults are not far behind!

*On-Line Social Networking.* On-line social networking is a tool that can build youth and adult coalitions and address issues affecting people today – from health care to employment to education. In the age of YouTube, Twitter, My Space, and Facebook, young people and even adults are increasingly aware of and responsive to web content and digital story telling. Policy boards that want to increase youth and adult participation and involvement will benefit from embracing the internet as a coalition-building tool.

Benefits of computer-mediated communication and issue forums include:
- Building community awareness;
- Encouraging local decision-making;
- Fostering dialogue between groups, especially far-flung ones;
- Increasing and supporting community participation by youth and adults;
- Increasing issue and resource awareness; and
- Providing youth with multimedia creation and editing skills.
- Outreach for other activities is easy and readily accessible.

The internet provides an excellent resource for fostering creativity as a way of engaging youth. In addition, the digital medium crosses more boundaries and can bring together diverse parties in a way that more traditional approaches to coalition-building and community engagement simply cannot hope to better.

*Full Disclosure and the Internet.* The benefits of online and computer-based forums are many, but users do need to be warned about a few things:
- There is a potential lack of confidentiality inherent in online communication;
- References, sources, and authorship can be difficult information to maintain; and
- Abuses of identity that stem from the lack of face-to-face interaction can occur.

*Examples of Internet Tools.* There are numerous many online health and wellness resources, discussion forums, chat rooms, blogs, and networks. You can host your own through GoToMeetings. Here are just a few Colorado, National, and youth-specific examples.

*Colorado Forum Example:*
- National Network of Libraries of Medicine: Colorado: [www.nnlm.gov/mcr/states/colorado.html](www.nnlm.gov/mcr/states/colorado.html)

*National Forum examples:*
- Mental Health Forum: [www.mentalhealthforum.net/forum/index.php](www.mentalhealthforum.net/forum/index.php)
- Mental Health Support Community: [www.psychforums.com](www.psychforums.com)
- Med Help – Finding Cures Together: Mental Health: [www.medhelp.org/forums/MentalHealth/wwwboard.html](www.medhelp.org/forums/MentalHealth/wwwboard.html)
- Depression Forums: [www.depressionforums.org/forums/forums.html](www.depressionforums.org/forums/forums.html)
- Psychology Self-Help and Mental Health Forum: [www.forum.psychlinks.ca/](www.forum.psychlinks.ca/)

*Youth-Focused Examples.* Canada has some excellent examples of innovative information technology programming that provide a voice for disenfranchised youth:

- Project YouthTube is a coalition of youth, youth-led organizations, and agencies serving youth from across Toronto who have come together to wield the political clout of Toronto's youth. Recognizing the systemic nature of the exclusion of youth from electoral politics, YouthTube aims to challenge the structural barriers facing youth in Toronto's underserved neighborhoods, from feeling welcome in and/ or accessing Canada's political system (with emphasis on those marginalized on the basis of race, gender, immigration/ citizenship status, sexuality, etc). [http://projectyouthtube.ca/](http://projectyouthtube.ca/)

- Regent Park Focus Youth Media Arts Center, a Toronto-based, youth driven, not-for-profit organization, is motivated by the belief that community-based media can play a vital role in building and sustaining healthy communities and seeks to increase civic engagement and effect positive change through youth-led media productions. The Center's programs are aimed at culturally marginalized diverse youth living in and around the community. With free access to media technology, participants work collectively to explore issues and develop resources that contribute to the health of their community and address systemic barriers to equitable social participation. [http://www.catchdaflava.com/](http://www.catchdaflava.com/)

## *Other Resources for Your Board*

- Parent-Professional Partnership Training, Training oriented to improve the relationship between families and agency staff. Contact the Federation of Families for Children's Mental Health ~ Colorado Chapter at http://www.coloradofederation.org/ or 303-572-0302.

## *Materials and Examples*
*(available at: http://sparkpolicy.com/fiscalfam_youth.htm)*

- ✓ Best Practices and Steps for Focus Groups
- ✓ Discussion Guide for Using Input from Outside the Room
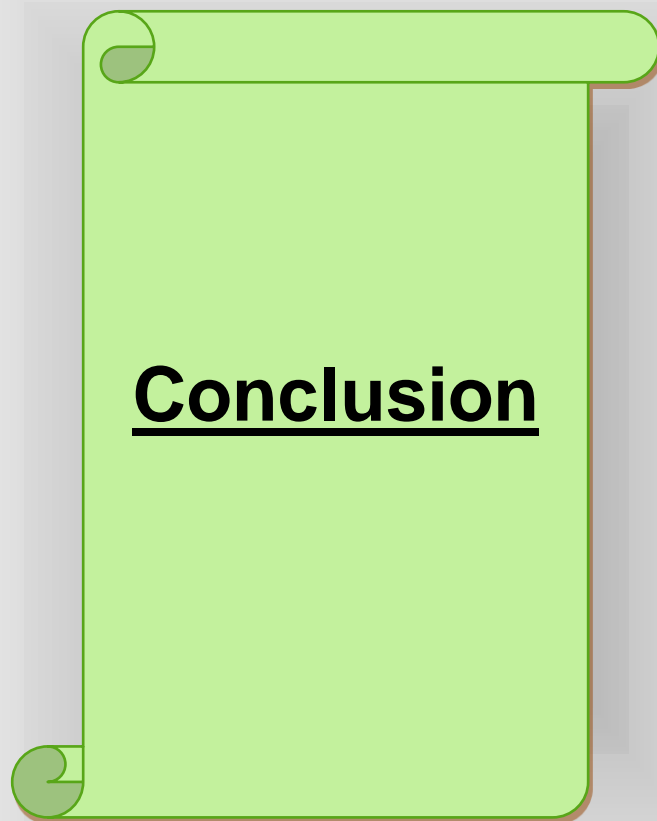
# **Conclusion**

# CONCLUSION

The LINKS Family and Youth Involvement leadership team and local experts have contributed to, revised, reviewed, and thoroughly vetted this workbook to guide committees, boards, and other work groups to be able to adapt policies and procedures to create and sustain family and youth board members.

Family members say the culture often does not seem friendly and that it is hard to know all the jargon. Professionals find it difficult to keep and/or engage family members and youth, or they see the same family members and youth on each board.

This workbook is applicable for:
- Any youth and family service system;
- The public sector;
- The private sector; and
- All government sectors.

The tools and other resources in this workbook will improve your board's ability to establish a board culture of inclusion and policies to back it up.

In her primer *Building Systems of Care*, Sheila Pires says that the primer is "intended to be modified as knowledge grows and as new players join the system building effort." This sense of humility and openness to learning is an ideal approach with which to enhance the developing skill set of Colorado stakeholders working to improve partnerships with youth and families. Colorado has made significant gains in this area to date.

At the 2008 LINKS BIG Meeting, the national speaker, Dr. Janice Cooper, with the *National Center for Children in Poverty, Mailman School of Public Health, Columbia University*, said that states across the country are grappling with ways to effectively partner with families and youth.

Colorado's Judge KJ Moore, with the *1st Judicial District*, and other Colorado speakers, addressed the need to improve our partnerships with families. Judge Moore described the benefits she has seen in her courtroom when families and youth are able to effectively partner with system professionals.

The LINKS BIG Meetings engage over 100 state, local, non-profit, private, and family and youth stakeholders in a full-day conversation that includes learning about state

policy and brainstorming solutions to barriers. This year, representatives of the Colorado Judicial, Executive, and Legislative branches, local leaders, system employees, families and youth, and family advocates addressed the subject of sustaining integration. Meeting participants recognized an improvement in our partnership abilities; however, barriers to family and youth involvement noted were:

- Lack of access to the information professionals receive;
- Lack of support, as the token family member;
- Resistance from board members to including families and youth;
- Lack of board strategies for actively engaging new families in conversations that have been going on for a long time; and
- Lack of flexibility in board meeting times and locations.

Families and professionals have champions who have brought Colorado to the forefront in family and youth inclusion in the development of policies that affect them. But there is more work to be done, and the "usual suspects" cannot do this alone. Now is the time to help your board take a lead, involve families and youth, and create the best policies for them that you can. Be that leader.

This workbook is your board's toolkit. With it, you can:

- USE the tips to change your bi-laws and institutionalize new family and youth inclusion policies;
- TRY the strategies to recruit local family members;
- CREATE a mentor program;
- CONTACT the resources listed for training and consultation;
- UTILIZE the references found in each chapter for increased learning; and
- ADAPT the tools and create orientation materials for new members.

The professionals, families, and youth who worked on this workbook strongly encourage you to recruit, sustain, and support youth and family on your board.

**This workbook is set up for your board to charge ahead, regardless of your level of readiness and need.**

      **Ready…**

          **Set…**

              **Get going already!**

> **"…Youth didn't have a way to give input, especially those who couldn't vote. So, it's important because now there's a way to get our voice out there on the issues and policies affecting us. It just makes sense."** Laura Nass, 18, Durango Colorado

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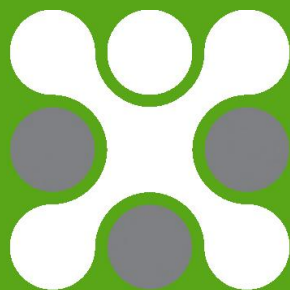
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