



New CEO Orientation & Training

Sunday, March 22, 2020

11:00 - 5:00 pm

District Room

Embassy Suites Convention Center - Washington, DC

Confirmed Participants: Beth Franco (SC), Andy Imparato (CA), Melissa Keyes (IN) Loida Enid Oliveras (PR), Gwen Orłowski (NJ) and Kerstin Sjoberg (OH)

Invited but not confirmed: Morna A. Murray (RI), Dan Somerfleck (GU)

Trainers:

- James Tucker, Executive Director, Alabama Disability Law Project;
- Mary Faithful, Executive Director, Disability Rights Texas
- Curt Decker Executive Director, National Disability Rights Network (NDRN);
- Eric Buehlmann, Deputy Executive Director for Public Policy, NDRN; and
- David Hutt, Deputy Executive Director for Legal Services, NDRN;
- LaToya Blizzard, Fiscal and HR Training and Technical Assistance Specialist; and
- Nachama Wilker, Deputy Executive Director for Training and Technical Assistance, NDRN.

Welcome, Introductions, Material Review, and Training Overview – Nachama
(CEO's to discuss what is working well and where are your challenges)

Strengths and Challenges of the P&A System – Curt

(Overview of issues for P&As and NDRN at this time in our history, vision of next five years)

Unique and Expanding Role and Expectations of the P&A System – James

(Disability community expectations, P&A community expectations for range of services – balancing state and national concerns, special education vs. adult issues, role of P&A – building community capacity, P&A Standards - values and principles of the system)

Finding Your Balance as the New ED - Mary

(understanding the organizational structure and culture, integrating your skill set and ensuring coverage of critical issues, managing organizational change, clarifying your focus in the short and long term, managing staff and board expectations, annual plans)

Understanding the Board Partnership – Mary

(When and how can you make changes, if you have or have not, been part of the agency? What is governing? Conflict of interest, staff contact, leadership within the P&A, role of the ED with the Board/Priority Setting, strategic planning, staff development, program evaluation best practices in priority setting, what guidance to expect from board, PAIMI council membership/duties, how access culture of agency)

Organizing to Maximize Client Services While Promoting System Change – James

(Ethics, client confidentiality, guidelines and standards for practice, retainer agreements, professional liability, case load expectations, e-mail retention policies, legal fees, reaching out to diverse communities, manage legal agency as a non-attorney, designing, implementing and maintaining an effective program, define circumstances most useful to systems change work, pro-bono activity)

Ensuring and Managing Resources Effectively - Mary

(managing people, policies and procedures, organizational development, diversifying funding base, pro-bono resources, building effective teams, motivate staff to change, performance evaluations, monitoring reviews – how often, by whom, policies and procedures manual)

Introduction to TASC Resources/Wrap-up and Evaluation – Nachama

Adjourn

Dinner