



## New CEO Orientation & Training

### **Materials List**

March 22, 2020

#### **Handouts Folder:**

Right-hand side:

- Agenda
- Materials List
- History of NDRN and Disability Legal Advocacy Network power point
- P&A Standards  
<https://www.tascnow.com/resource/protection-and-advocacy-standards/>
- Timeline of Disability Rights Movement
- Taking Charge: A Guide for New Executive Directors (MIE)
- Summary Report Leadership
- TASC Services Guide

Left-hand side:

- Current Appropriations Chart
- History of Appropriations Chart
- Federal Grant Reporting Deadlines
- NDRN membership Brochure
- Program Income and Carry Over Chart
- Sample Case Docket Report - AL
- ED Blueprint to Empower – TX
- TX Board Blueprint to Empower FY 2019
- TX Board Job Description
- Evaluation

## **Resources Tab 1: History of the P&As, the Role of NDRN and the P&A Standards**

1. History of NDRN and the Disability Legal Advocacy Network
  - o [[Video](#)]
  - o [[PowerPoint](#)]
  - o [[Transcript](#)]
2. Introduction to P&A Advocacy Standards
  - o [[Video](#)]
  - o [[PowerPoint](#)]
  - o [[Transcript](#)]
  - o [[P&A Standards](#)]
3. Incorporating P&A Values Into Our Daily Work
  - o [[Video](#)]
  - o [[PowerPoint](#)]
  - o [[Transcript](#)]
  - o [[Hypos](#)]
  - o [[P&A Standards](#)]
4. P&A Overview
5. Citations Re. P&A Functions
6. NDRN Relationship
7. NDRN Membership Agreement
8. Intervention Policy
9. Acronyms
10. P&A ED directory
11. Kansas Input for new CEOs from new CEO meeting 3/19

## **TAB 2: Helpful Tools for Managing the P&A**

1. P&A Enabling Statutes
  - a. DD Act
  - b. PAIMI Act
  - c. PAIR
  - d. PABSS
  - e. PATBI
  - f. CAP
  - g. HAVA
  - h. PAAT
  - i. Note of Federal Authorities on Website
2. Federal Monitoring Tools

- a. AIDD – Quality Review System Resource Guide, Guidebook
- b. CMHS - Monitoring Instrument, Documentation of Eligibility, Grantee Financial Management Checklist  
<https://www.samhsa.gov/grants/grants-management/policies-regulations/financial-management-requirements>
- c. RSA – PAIR and CAP monitoring protocol 2017
- d. PABSS – 2016 protocol
- 3. PPRs: <https://www.tascnow.com/tasc/function/pprs.html> - On this page you will find resources and trainings to assist P&As with completing the annual Program Performance Reports (PPRs) to the federal funders.
- 4. Guidelines for Attorney Practice
- 5. Ethics Consultants Group Protocol
- 6. Word Matter
- 7. PABSS Revised Conditions of Grant Award
- 8. Organizational Charts

**TAB 3: Approaches for Organizational & Board Success**

- 1. Board Roles Training General
- 2. Board Fiscal Orientation Disability Rights Texas
- 3. Accountability Standards
- 4. Sarbanes Oxley Checklist
- 5. Good Governance Guide
  - a. Principles Executive Summary
  - b. Principles Guide
  - c. Principles Workbook
  - d. Principles Workbook Worksheet
  - e. Principles Reference
  - f. Panel Final Report
  - g. Panel Supplement Final
- 6. Principles of Good Governance Executive Summary
- 7. Governance is Governance
- 8. 10 Keys to Successful Strategic Planning for Nonprofits
- 9. TA Quick Note Managing Conflicts
- 10. Sample Whistleblower Policy

11. Evaluating Your ED- Enterprise Foundation
12. PAIMI Roles and Responsibilities
13. Client Satisfaction Surveys
14. Charging Fees for Services Provided by P&As
15. CO Fee Schedule Policy
16. Crafting a Capital Campaign
17. Pre-Campaign Planning
18. Conflict of Interest Policy – Disability Rights Texas
19. Conflict of Interest Disclosure – Disability Rights Texas
20. Announcement for Board Recruitment – Disability Rights Texas
21. New Board Application – Disability Rights Texas
22. New Board Orientation Table of Contents– Disability Rights Texas
23. Job Description – Board member – Disability Rights Texas
24. Blank Applicant comparison – Disability Rights Texas
25. Document Destruction Timeline
26. Sample Record Retention Policy
27. AIDD Concerns Regarding Independence of State Entity P&A
28. Blank ED Evaluation Form - DRC (Kansas)
29. Board of Directors Standards of Practice Excerpt (Kansas)
30. Article of Incorporation and Bylaws - Disability Rights Texas
31. Table of Contents for Priority Setting Documents - Disability Rights Texas

#### **TAB 4: Systemic Change through State Legislative Activity**

1. Meeting with Policy Maker
2. The World of Your Legislator
3. Good Advocate
4. ADD Memo on Public Policy Advocacy

#### **TAB 5: Ensuring Managing Resources Effectively**

1. Completing the Federal Financial Report (FFRs)
2. Disability Rights Texas Work Rules and Policy Manual
3. TA Quick Notes on Internal Controls
4. OMB Prior Approval documents

5. What it Takes to run a good fiscal office
6. Sample 990 auditor questions
7. 990 and audit rules
8. Kansas Accounting Manual
9. DRC Employee Policies and Procedures (KS)
10. TA Quick Notes on Monitoring
11. Collective Bargaining Agreement - Disability Rights Texas
12. Uniform Guidance Documents
  1. 2 CFR 200 Changes – (Super circular)
  2. 2 CFR 200 Agency Implementation Plans
  3. Department of Education FAQs
  4. 2 CFR 200 FAQs
  5. Uniform Guidance 2 CFR Part 200
  6. Uniform Guidance Appendices 2 CFR Part 200

#### **TAB 6: TASC Resources**

1. New Employee Orientation Manual
2. TASC Committee Structure
3. PAL General Information
4. Guide to Joining and Using TASC Listserv

#### **TAB 7: Legal Assistance Materials**

1. Case Selection Criteria - Arizona Center for Disability Law
2. Limited Scope Legal Assistance - Arizona Center for Disability Law
3. Revised Co-Council Agreement - Arizona Center for Disability Law
4. Unauthorized Practice of the Law - Arizona Center for Disability Law
5. Client Services Manual - Disability Rights Texas
6. Sample Litigation Report - Disability Rights Texas