

# Checklist for Supporting and Empowering Family Leaders

## Purpose

This tool is intended to provide a quick reference checklist for staff mentors committed to supporting family leaders.

## How to Use This Tool

This checklist highlights important structural pieces that need to be put in place to prepare to support family leaders, themes to address and information to provide to empower parents and provide context, recommendations for check in meetings and agendas, and considerations regarding implementing a “buddy” system. This tool is not intended to be used directly with family leaders, but rather as a guiding document for the staff mentor and others interested in grounding authentic parent engagement in their practice.

## Structural Supports

There are structural pieces the organization and mentor can put in place ahead of time that will make for more effective family leader support. These include:

- Creating a partnership agreement that outlines what is expected of the family leader and what the family leader can expect from the organization and mentor;
  - Creating guidelines with respect to confidentiality and communicating those to both the family leaders and other participants;
  - Developing and implementing firewalls between any feedback the family leader shares and the services their family is currently or may in the future receive, and communicating those to both the family leaders and other participants; and
  - Identifying resources and creating a plan in advance to help family leaders as needed with any trauma that may arise through their participation.
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## Empowering Conversations

While each family leader will need support in unique ways, there are common themes it can be helpful to cover. These include:

- The expertise family leaders bring to this work and why it is needed
  - How personal experiences can be harnessed for program improvement and systems change.
  - What the broader context and history is of the program/ system being discussed
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## The Support Cycle

Family leader support is an iterative cycle with each interaction building on the one before it. Ideally, this will be a series of conversations including:

- Recruitment meeting
- Introductory meeting
- For each group meeting:
  - Materials distribution
  - Pre-meeting check-in
  - During meeting support
  - Post-meeting check in
- Mid-point check-in
- Conclusion/ evaluation check-in

The conversations will look different at each stage of the process, but they will all involve building trust and serving as a resource.

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## RECRUITMENT MEETING: Best done in person or via zoom

- Brief introduction to the organization
  - Explanation of what the decision-making group is trying to accomplish and how family leaders will be part of this effort
  - Ask if this goal is something that they would be interested in being part of achieving
  - Walk through the partnership agreement explaining what the commitment expected of the family leader will be and what they can expect from the organization in terms of process and support (stipends and other supports along with staff support)
  - Answer any questions and ask if there are barriers that might keep them from participating
  - Ask if they are interested in participating
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## INTRODUCTORY MEETING: Best done in person or via zoom

- Spend time getting to know one another-ask more about how they came to be involved in this work, what they are passionate about or why they want to get involved, and be prepared to share your own story with this work
  - Provide background and history about the program, organization, coalition
  - Review the goals of the effort and how family leaders will be involved
  - Walk through briefly who else will be involved and what perspectives they bring- a directory with participants' pictures, names, organization, and title can be helpful
  - Discuss what to expect at the first meeting
  - Answer any questions they might have
  - Talk about what would make participating work best for them and what barriers they might experience in fully participating. This is a good opportunity to explore barriers in more depth and begin assessing solutions.
  - Discuss any logistical needs with regard to participation such as forms, stipends, etc.
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## FOR EACH GROUP MEETING:

- Materials distribution:** All meeting materials including agenda and background materials should be provided to participants with enough time for them to review them at their own pace. Based on the barrier assessment, the materials should either be provided electronically or be mailed to the participant. If the family leader is not comfortable reading in English, translated materials should be provided.
- Pre-meeting check-in:** Can be done via phone or zoom-Once the participant has received and had time to review the materials, the mentor should schedule a brief check-in to walk through the materials, answer any questions, and highlight what the primary questions and topics will be for the meeting. The mentor should encourage the family leader to weigh in when they have things they want to add. Prior to the first meeting, the mentor should ask whether the family leader feels comfortable introducing themselves or if they would like to be introduced.
- During meeting support:** The mentor should sit near the family leader/s to answer any questions, provide clarification as needed. When jargon is used or greater context is needed, the mentor should ensure it is addressed.
- Post-meeting check in:** Can be done via phone or zoom-The mentor should schedule a brief check-in a few days after the meeting to see how the family leader felt it went, answer any questions that have arisen, review the decisions that were made and make sure the family leader understands how their input is affecting the decision-making and what contribution they had for that meeting.

### Ask the family leader:

- How it felt and what could be done differently next time
- If there was anything that kept them from fully participating or made them uncomfortable
- If the family leader did not weigh in where they had previously indicated they wanted to, the mentor could gently ask why they chose not to share and if there was anything that could have been done to make them more comfortable participating.

### Follow up with outcomes of the meeting as they become available.

- Cycle begins again** prior to the next meeting.
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## MID-POINT CHECK-IN: Best done in person or via zoom

- Mid-way through the project period, the mentor should schedule a longer check-in to discuss how the project is going, how the family leader feels about the progress and their participation, revisit whether any additional barriers have come up, and discuss what could make it a more rewarding experience for them.

## CONCLUSION/EVALUATION CHECK-IN

- At the conclusion of the project, the mentor should schedule an exit interview to discuss how the family leader felt about the project and the outcomes, whether they felt supported to participate fully, what they would recommend doing differently. This is also an excellent time to explore if/ how the family leader would like to be involved moving forward. Are there additional family leadership opportunities with the organization or with partners in the community with whom you could connect them? Ideally this experience will be one step of many on their leadership journey.

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## Buddy System

It can be helpful to pair a family leader with another participant with professional/ system expertise as an informal mentor. Initiatives interested in implementing this type of support should:

- Ask the family leaders if they would be interested in a buddy.
- If there is interest, the mentor will:
  - Poll professional participants to gauge interest in serving as a buddy
  - Pair the family leader up with the volunteer who would be the best match
  - Set up an informal phone call between the two prior to the first meeting

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