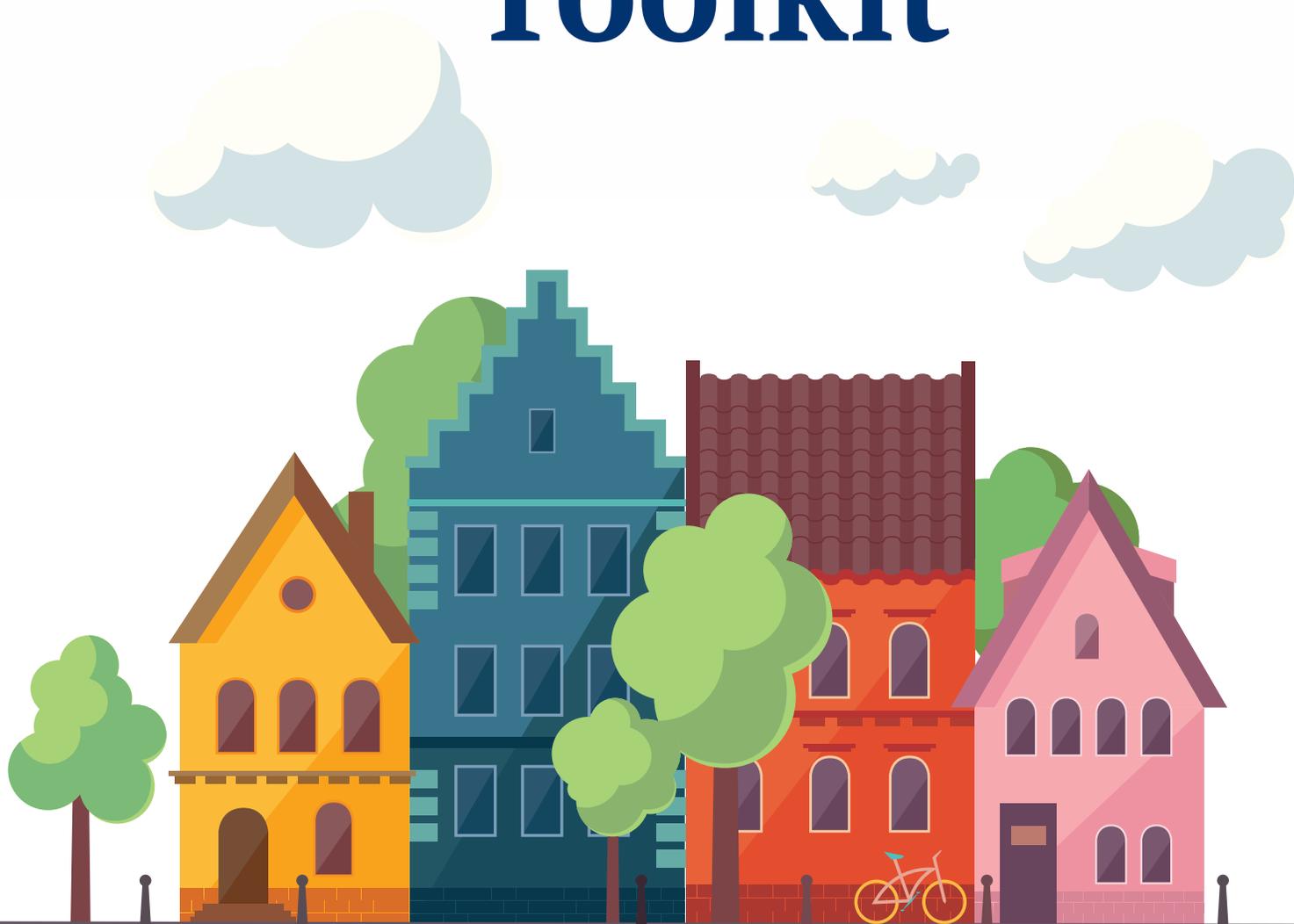




State Long-Term Care  
Ombudsman Program

# Resident Council Toolkit



December 2024

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# Get Started

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A resident council is an association of people who live in nursing or assisted living facilities that meets regularly to collaborate and advocate for better quality of life and care.

## Introduction

The Texas Office of the State Long-Term Care Ombudsman created this toolkit to help residents understand the purpose of resident councils and how to start or revive a resident council. Friends, family members, and staff may also find this handbook useful to better understand how to support resident councils.

The purpose of this toolkit is to:

1. describe the purpose of a resident council;
2. explain the benefits of a resident-run council;
3. provide advice on forming or improving a resident council; and
4. give problem-solving tips for common concerns.

## Why Have a Resident Council?

A resident council is an association where people who live in nursing or assisted living facilities join in a united voice to share the resident point of view. It is like a neighborhood association without the fees.

A resident council can have many benefits, such as:

1. communicating with administrators and staff;
2. learning the needs of residents;
3. solving problems;
4. collaborating;
5. planning meetings, events, and activities;
6. educating residents, staff, and others;
7. sharing information between residents and others;
8. forming committees; and
9. advocating for better quality of life and care.

Use this toolkit to help you start or improve a council.

## **Laws Protecting Councils**

The 1987 Nursing Home Reform Law guarantees residents the right to meet privately and regularly as a resident council.<sup>1</sup>

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<sup>1</sup> 42 Code of Federal Regulation §483.10. Retrieved July 20, 2016, from [ecfr.io/Title-42/Part-483](http://ecfr.io/Title-42/Part-483).

## **Nursing Facilities**

The Texas Administrative Code (26 TAC §554.706) gives nursing home residents the right to meet as a resident council and requires a facility to:

1. help residents attend meetings;
2. help find a private space for meetings;
3. let staff attend meetings only at the residents' invitation; and
4. listen and respond to any complaints or recommendations from the council.<sup>2</sup>

A facility cannot end a resident council, interfere with a resident council, or retaliate against a resident council or its members.

## **Assisted Living Facilities**

The Texas Administrative Code (26 TAC §553.267), Resident's Bill of Rights, says:

(3) Each resident in the assisted living facility has the right to

(H) complain about the resident's care or treatment. The complaint may be made anonymously or communicated by a person designated by the resident.

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<sup>2</sup> Texas Administrative Code, 26 TAC §554.706 (2020). Retrieved November 14, 2023, from [https://texreg.sos.state.tx.us/public/readtac\\$ext.ViewTAC?tac\\_view=5&ti=26&pt=1&ch=554&sch=H&r=Y](https://texreg.sos.state.tx.us/public/readtac$ext.ViewTAC?tac_view=5&ti=26&pt=1&ch=554&sch=H&r=Y).

The facility must promptly respond to resolve the complaint. The facility must not discriminate or take other punitive action against a resident who makes a complaint;

(R) privacy, while attending to personal needs and a private place for receiving visitors or associating with other residents, unless providing privacy would infringe on the rights of other residents. This right applies to medical treatment, written communications, telephone conversations, meeting with family, and access to resident councils [...]<sup>3</sup>

## **First Steps**

If your home does not have an active resident council, you can start one.

## **Tips to Start a Council**

1. Read about resident councils. This booklet is a good start. A long-term care ombudsman can help you find more tools.
2. Recruit other residents to join you.
3. Discuss the value of a resident council with residents, staff, and families.
4. Brainstorm about what a resident council at your home might look like. Think about:

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<sup>3</sup> 26 Tex. Admin. Code §553.267 (2021). Retrieved November 14, 2023, from [https://texreg.sos.state.tx.us/public/readtac\\$ext.ViewTAC?tac\\_view=4&ti=26&pt=1&ch=553](https://texreg.sos.state.tx.us/public/readtac$ext.ViewTAC?tac_view=4&ti=26&pt=1&ch=553) .

- why a resident council is important to you;
  - what you want to accomplish in the council;
  - possible obstacles to the council (resistance, lack of interest, scheduling); and
  - possible leadership.
5. Schedule a planning meeting to talk about starting or improving a council.
  6. Advertise the meeting to all residents and invite them to attend.
  7. Discuss or vote on a regular time and frequency for meetings, the council structure (see page 15), and what else needs to be done to prepare.
  8. Assign people to plan and advertise future meetings.
  9. Work with staff to find a private place and choose a time to hold regular meetings.

| Residents run the council.

## **Get Support**

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Create a support system for your council.

### **Role of the Long-Term Care Ombudsman in Resident Councils**

In this this toolkit, "ombudsman" means a long-term care ombudsman. Ombudsmen only attend meetings and help with councils if invited by residents. An ombudsman can help find resources, advertise, and recruit members, communicate with staff and family members, or give a presentation on a topic important to council members. Ombudsman presentation topics include:

1. care planning;
2. individualized care, resident-directed services, and culture change;
3. residents' rights;
4. physical and chemical restraints;
5. abuse and neglect;
6. role of the ombudsman; and
7. advocating for yourself.

It is best for residents to do the work themselves.

Ombudsmen support and advocate, but the council should be run by and for residents.

## **Resident Council Story**

When an ombudsman was invited to a meeting, she heard that a resident wanted to resign from the council. The resident said that at 94 years old he could no longer hear what was happening at meetings and thought he could no longer contribute.

The ombudsman and activity director asked if they could help, and the council agreed. The activity director found an unused amplifier and helped the resident set it up.

With the headphones and microphone on the table, it was clear that the resident could now hear the meeting! He asked to take back his resignation and the council agreed.

The ombudsman was invited back and says the resident continues to be an active and involved member of the council.

## **Staff Commitment and Training**

When it comes to resident councils, facility staff may be supportive, hesitant, or somewhere in between. Remember, it is the residents' right to meet as a council privately and regularly. However, staff buy-in can add value to the council and help the council run better.

Meet with the administrator and staff and explain to them why a resident council is important to you. Share goals for the council.

Ask if staff have any concerns. If there are specific concerns that you agree could be a problem, work with them to find a solution. Provide group or one-on-one training to staff about residents' rights and resident councils. An ombudsman can help if needed.

Get a written commitment from administration or have a manager attend a meeting to let residents know the facility supports the council.<sup>4</sup> Ask the administrator to provide private meeting space at least monthly and to only attend if invited.

## **Plan the Meeting**

Share ideas with other residents and find out who else wants to participate. Schedule a planning meeting when many people will be available, and you will have a private space. Verify the meeting space is available.

Advertise the meeting (see page 31) and invite all residents to the meeting. Verbally inform residents who have vision loss.<sup>5</sup>

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<sup>4</sup> Kerr, E. W., Brown, M., & Clarke, D. (2005). *How to organize and direct an effective resident council*. [online]. Missouri Department of Health & Senior Services. Retrieved July 20, 2018, from [health.mo.gov/seniors/ombudsman/pdf/HowToOrganizeAnd\\_DirectAnEffectiveResidentCouncil.pdf](http://health.mo.gov/seniors/ombudsman/pdf/HowToOrganizeAnd_DirectAnEffectiveResidentCouncil.pdf)

<sup>5</sup> Florida Ombudsman Program. (2018). *Resident Council Handbook: A Guide to Building a Long-Term Care Resident Council*. Department of Elder Affairs, State of Florida. Retrieved March 20, 2021, from [ombudsman.myflorida.com/publications/rr/Residents-Council-Handbook-2018.pdf](http://ombudsman.myflorida.com/publications/rr/Residents-Council-Handbook-2018.pdf)

## Planning Meeting Objectives

1. Talk about the importance of the resident council.
2. Share information about staff commitment.
3. Give examples about how other councils have worked together and solved problems.
4. Listen to suggestions and ideas from attendees.
5. Give information about what the next steps are and how people can participate.
6. Follow up with attendees (see page 32).

Residents' have the right to meet as a council privately and regularly.

Educate staff and get their support.

## Resident Council Story

Last year, only eight residents regularly attended the monthly council meeting at a large facility. The activity director led the meetings and they only lasted ten minutes. Residents were not comfortable expressing their concerns. The only officer in place was the secretary.

In the last three months, the council has completely changed. Residents learned more about councils and improved the council by nominating and electing a president, vice president, and treasurer. They asked the activity director to only take and read the minutes.

The president now creates the agenda and leads the meeting. More than 25 residents regularly attend and are more comfortable sharing.

The council recently worked with staff to find a private place for religious study meetings, suggested balanced meal plans, and taught residents how to advocate for their rights. For example, a council member told another resident about his right to stay up as long as he likes after a nurse told him he had a specific bedtime.

# Create Your Council

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Create a council that best suits your home's residents and meeting space.

## Different Structure Types

Structure is how you organize the people in your council.<sup>6</sup> Will only officers attend or is the meeting open to everyone? Will officers represent groups or projects? Who votes during meetings?

Every council is different. Work together to decide what structure type is best for your home.

## Pick a Council Structure

When picking a council structure, think about:

1. How many residents are interested in participating?
2. What will be the level of meeting formality?
3. How often will the council meet?
4. Will a few leaders share the responsibilities, or will everyone share the responsibilities?
5. What will be the level of staff involvement?
6. How many people will your meeting space accommodate?

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<sup>6</sup> Kerr, E. W., Brown, M., & Clarke, D. (2005).

## Structure Type 1: Town Hall Meetings

In a council structured as a Town Hall Meeting, every resident is a member of the council. Officers, called the executive committee, direct the council. Officers are often elected.

All residents have a chance to attend meetings, make suggestions, and participate in decision making. Subcommittees work on specific problems as needed.

### Characteristics of a Town Hall Meeting Structure

1. Everyone can attend and participate in meetings.
2. The meetings are often less formal and more communal.
3. Officers are elected to roles like president, vice president, secretary, and treasurer.
4. Some homes may not have the space to hold meetings with large numbers of people.
5. It might be harder to hear others and to follow formal rules and procedures.<sup>7</sup>

Officers direct the council. All residents may participate.

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<sup>7</sup> Kerr, E. W., Brown, M., & Clarke, D. (2005).

## Structure Type 2: Representative

The Representative structure for a council is a good option when there is not enough space for Town Hall Meetings. Chosen residents from different areas of the home, such as floors, hallways, or neighborhoods represent the residents in those areas.<sup>8</sup> These residents are called “representatives” and are elected to be on the council.

Representatives are responsible for participating in council meetings, knowing the concerns and wishes of residents they represent, and informing and reporting to residents about the council.

### Ways for *Non-Representatives* to Participate

1. Vote for representatives and discuss their concerns and ideas with their representative.
2. Hold and participate in open meetings for all residents every few months.
3. Allow time at each meeting for communication from residents who are not representatives.
4. Participate in committees.

Instead of all residents attending council, residents elect or recruit representatives to attend on their behalf.

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<sup>8</sup> Kerr, E. W., Brown, M., & Clarke, D. (2005).

## Characteristics of a Representative Structure

1. This structure may work for more populated homes where a town hall meeting may be impractical due to limited meeting space.
2. Members who are selected or elected may be more invested and reliable.
3. All residents may participate and bring concerns to their representatives.
4. It can be easier to divide tasks.

### **Structure Type 3: Committee**

Committee models resemble representative models because members are elected. However, the members do not represent a specific group like a floor or wing.

The Committee meets regularly and communicates with staff. Each member is also the chair of a subcommittee (see pages 21-22) that works on specific topics.<sup>9</sup> Any resident can be a member of a subcommittee. Use the tips on page 17 for involving non-representatives in this structure type.

## Characteristics of a Committee Structure

1. This structure may work for more populated homes where a town hall meeting may be impractical due to limited meeting space.

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<sup>9</sup> Kerr, E. W., Brown, M., & Clarke, D. (2005).

2. Other interested participants can also serve on subcommittees.
3. It may be easier to have more formal rules and procedures. Elected people may be more invested in the council.

Elected officers participate in council meetings. Non-council members (any resident) can serve on subcommittees.

## **Officers and Leadership Duties**

Residents elect other residents as officers to represent them. The positions should be taken seriously and with respect. Officers have duties, but all the work should not go to one or two people.

Bylaws (see page 24) set rules for selecting officers, term limits, and what to do when an officer can no longer meet his or her duties. Bylaws describe the expectations, responsibilities, and time commitment for each position.

## **Examples of Common Officer Positions**

### **President or Chairperson**

The president creates the agendas and leads the meetings. The president is responsible for keeping to the agenda and schedule. The president often speaks for the council.

## **Vice President or Vice Chair**

The vice president or vice chair fills in for the president if needed. Sometimes, the vice president is also the chair of important committees.

## **Secretary**

The secretary is the record-keeper for council meetings. The secretary distributes minutes and agendas, calls the roll, and takes meeting minutes. If the secretary is unavailable another member takes the minutes.

## **Treasurer**

The treasurer keeps records of council funds, reports to the council on the funds, and keeps the funds separate from other funds.

## **Staff Advisor**

The staff advisor is an optional member. The council may invite staff “as needed” as a resource or request physical assistance for activities like writing minutes.

The resident council receives support, but not interference, from staff.<sup>10</sup>

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<sup>10</sup> Florida Ombudsman Program. (2018). *Resident Council Handbook: A Guide to Building a Long-Term Care Resident Council*.

## **Volunteers**

People who are not residents are sometimes asked to attend or become a member of the council. Residents are still leaders of the council.<sup>11</sup>

Officers have duties, but all the work should not go to one or two people.

## **Committees and Subcommittees**

Committees and subcommittees are groups assigned to work on specific tasks. Committees can be permanent or temporary. Subcommittees are smaller — between two and six members — and present reports and updates to the council regularly.

## **Examples of Common Subcommittees**

### **Resident's Rights Committee**

The Resident's Rights Committee educates others on resident's rights, promotes, and monitors resident's rights in a facility.

### **Quality Care Committee**

The Quality Care Committee reports on quality-of-care issues. Works with staff to fix problems and start programs to improve quality of care.

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<sup>11</sup> Stearns, J. (2014). *Adult Home Resident Council Toolkit* [Pamphlet]. New York, NY: Coalition of Institutionalized Aged and Disabled and NYS Long Term Care Ombudsman Program. Retrieved July 20, 2016, from [ltombudsman.ny.gov/residents/AdultHomeResidentCouncilToolkit.pdf](http://ltombudsman.ny.gov/residents/AdultHomeResidentCouncilToolkit.pdf).

## **Grievance Committee**

The Grievance Committee listens to complaints of any resident and files complaints on behalf of the council. Can operate a suggestions or complaints box.

## **Food Committee**

The Food Committee asks residents about likes and dislikes; takes food complaints and suggestions; makes suggestions to dietitian; and plans special meals.

## **Birthday Committee**

The Birthday Committee provides recognition to all residents on their birthdays or special milestones.

## **Activity Committee**

The Activity Committee works with activity staff to plan and help with activities.

## **Sunshine Committee**

The Sunshine Committee sends well wishes to residents and staff who are ill or hospitalized and condolences to those who have lost loved ones.

## **Welcome Committee**

The Welcome Committee greets and supports new residents.

## **Volunteer Service Committee**

The Volunteer Service Committee coordinates volunteer activities and finds new volunteer opportunities.<sup>12</sup>

## **Parliamentary Procedures or Rules of Order**

Parliamentary procedures (or rules of order) are the rules for conducting a meeting, suggesting a vote or discussion, and voting.

Councils use parliamentary procedures to make sure meetings are orderly, all have an opportunity to speak, and that minority opinions are heard but majority votes rule.

The four most basic steps to find a majority opinion are:

1. make a motion;
2. second the motion;
3. discuss the motion; and
4. vote on the motion.<sup>13</sup>

See pages 55-60 for a parliamentary procedures *cheat sheet* on how and when to use these steps.

Council members choose how formal they want to be. Some councils choose to stick to traditional

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<sup>12</sup> Kerr, E. W., Brown, M., & Clarke, D. (2005).

<sup>13</sup> Kerr, E. W., Brown, M., & Clarke, D. (2005).

parliamentary procedure during meetings, while others use it only when voting on an issue or election.

No matter what option works best for your council, say what rules you will follow in your bylaws.

## **Bylaws**

Bylaws are the rules that the council follows and are very important to an active council.

Create bylaws that are a good fit for your council. They should be simple to follow and to the point.<sup>14</sup>

Each bylaws section should only contain one idea.

Bylaws sections usually include the following:

1. the name of the group;
2. the purpose of the group;
3. when meetings are held and how they are run;
4. membership requirements;
5. officer titles, responsibilities, and term lengths;
6. nomination and election procedures;
7. how to replace an officer who can no longer serve;
8. names and duties of permanent committees;
9. how to choose residents to serve on committees;

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<sup>14</sup> National Consumer Voice. *Sample Resident Council By-Laws [PDF]*. (n.d.). Resident Council Center. (n.d.). Retrieved July 20, 2016, from [theconsumervoice.org/issues/recipients/nursing-home-residents/resident-council-center](http://theconsumervoice.org/issues/recipients/nursing-home-residents/resident-council-center).

10. management of funds; and
11. procedure for amending bylaws.

See pages 48-52 for sample bylaws.

The council should discuss and vote on bylaws before adopting them.

## **Vision, Values, and Mission**

Councils use vision, values, and mission statements to tell the world what they do and why they do it. Create a vision, values, and mission statement to guide the work of your council.

These statements will have more meaning if created as a group. During a meeting, members can submit and vote on ideas. See page 61 for a Vision, Values, Mission worksheet.

## **Vision Statement**

A vision statement is a declaration of the future you want to create with the help of your council.<sup>15</sup>

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<sup>15</sup> Gottlieb, H. (2007). *3 Statements That Can Change the World*. Mission/Vision/Values [PDF]. Help4Nonprofits. Retrieved July 20, 2016, from [http://help4nonprofits.com/PDF\\_Files/ARTICLE-3\\_Statements\\_That\\_Can\\_Change\\_the\\_World.pdf](http://help4nonprofits.com/PDF_Files/ARTICLE-3_Statements_That_Can_Change_the_World.pdf).

## Basic Formula to Create a Vision Statement

The resident council's vision is a community where

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## Examples of Vision Statements

American Society for the Prevention of Cruelty to Animals (ASPCA): "The United States is a humane community in which all animals are treated with respect and kindness."<sup>16</sup>

Habitat for Humanity: "A world where everyone has a decent place to live."<sup>17</sup>

## Values

Values are shared beliefs and principles that your council believes in no matter what the setting or issue.<sup>18</sup> Values guide council operations and choices. They can provide direction for council planning and actions.

It is important for council members to work together as a group to identify and choose core values.

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<sup>16</sup> ASPCA. Retrieved July 20, 2016, from [aspca.org/about-us/aspca-policy-and-position-statements/vision](http://aspca.org/about-us/aspca-policy-and-position-statements/vision)

<sup>17</sup> Habitat for Humanity. Retrieved March 10, 2021, from [habitat.org/about/mission-and-vision](http://habitat.org/about/mission-and-vision)

<sup>18</sup> Idealist.org (2016). *Resources: What should a mission statement say?* [online]. Retrieved July 21, 2016, from [idealist.org/info/Nonprofits/Gov1](http://idealist.org/info/Nonprofits/Gov1).

Establish four to six core values from which your council will operate.<sup>19</sup>

## **Basic Formula to Create a Values Statement**

Use the group's answers to the following questions to create a values statement.

1. What are the key values we want to guide our council?
2. How will we define and implement these values for our council?
3. Do these values inspire pride and bring out the best in us?<sup>20</sup>

For example, perhaps your council values respect, integrity, communication and transparency, collaboration, caring, and hard work.

Key values guide councils and inspire pride.

## **Example - Hotjar Value Statement**

- "Hotjar's culture is driven by respect, transparency, collaboration, and direct feedback."<sup>21</sup>

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<sup>19</sup> Idealist.org (2016).

<sup>20</sup> McNamara, C. (2016). Authenticity Consulting, LLC. [online] *Basics of developing mission, vision and values statements*. [online]. Retrieved July 21, 2016, from [managementhelp.org/strategicplanning/mission-vision-values.htm](http://managementhelp.org/strategicplanning/mission-vision-values.htm). [managementhelp.org].

<sup>21</sup> Handrick, L. (2018). *25 Core Value Statements from 2018's Top Organizations*. Retrieved March 10, 2021, from [fitsmallbusiness.com/core-values-list/](http://fitsmallbusiness.com/core-values-list/)

## Mission Statement

This is a statement of how you will achieve your vision. The mission statement describes the overall purpose of the council. Some mission statements are one sentence, others are a short paragraph. The best statements are clear, memorable, and to the point.<sup>22</sup>

## Basic Formula to Create a Mission Statement

Effective mission statements include:

1. who you are;
2. what you do;
3. what you stand for; and
4. why you do it.<sup>23</sup>

## Examples of Mission Statements

- American Association of Retired Persons (AARP): "To empower people to choose how they live as they age."<sup>24</sup>
- New York Public Library: "To inspire lifelong learning, advance knowledge, and strengthen our communities."<sup>25</sup>

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<sup>22</sup> Idealist.org (2016).

<sup>23</sup> Trost, K. (2018). *Council Post: How to run successful meetings in seven steps*. [online] Forbes. Retrieved July 21, 2018, from [forbes.com/sites/forbescoachescouncil/2018/04/18/how-to-run-successful-meetings-in-seven-steps/?sh=18f6c8e45eee](https://forbes.com/sites/forbescoachescouncil/2018/04/18/how-to-run-successful-meetings-in-seven-steps/?sh=18f6c8e45eee).

<sup>24</sup> Polacheck, L. (2013) *AARP's Mission and Vision*. Retrieved March 11, 2021, from [aarp.org/about-aarp/](https://aarp.org/about-aarp/)

<sup>25</sup> New York Public Library. Retrieved March 11, 2021, from [nypl.org/](https://nypl.org/).

The best mission statements are clear, memorable, and to the point (idealist.org).

## Example

### **AARP**<sup>26</sup>

#### Mission Statement

- “To empower people to choose how they live as they age.”

#### Vision Statement

- “Creating a society in which all people live with dignity and purpose and fulfill their goals and dreams.”

#### Core Values

- “Impact, innovation, humanity, empowerment, and honesty”

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<sup>26</sup> Polacheck, L. (2013) *AARP's Mission and Vision*.

## Best Practices

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Following best practice guidelines will help maintain your council and resident participation.

### Elections

If your council chooses to hold elections of officers, it is important to make sure running for office and voting are open to every resident, fair, and transparent.

### Tips for a Fair Election Process

1. Rules are posted before the election.
2. Term limits are defined.
3. Roles and responsibilities for officers and what to do if the officer can no longer meet her duties are clearly defined.
4. Voting information is well publicized and the voting process is accessible and confidential.
5. No compensation is allowed for votes.
6. The election focuses on issues, not people.
7. There is process for recognizing and thanking outgoing officers.<sup>27</sup>

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<sup>27</sup> Stearns, J. (2014). *Adult Home Resident Council Toolkit* [Pamphlet]. New York, NY: Coalition of Institutionalized Aged and Disabled and NYS Long Term Care Ombudsman Program. Retrieved July 20, 2016, from [ltombudsman.ny.gov/residents/AdultHomeResidentCouncilToolkit.pdf](http://ltombudsman.ny.gov/residents/AdultHomeResidentCouncilToolkit.pdf).

## **Advertise, Recruit, and Encourage Participation**

It is important that residents and staff are aware of the council, when meetings are scheduled, what the council does, and how to participate.

There are many ways to promote an upcoming meeting. The council could write a story for the home's newsletter, put out flyers, go door to door, make announcements at activities, give presentations at other meetings, create buttons or t-shirts, and plan special events and meals.

Recruiting and keeping members is often the most important activity for a council. It is important to understand why residents participate.

Residents say they participate in councils to:

1. have a voice in one's environment;
2. be creative and work together;
3. build relationships;
4. help others; or
5. get results and provide recognition.<sup>28</sup>

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<sup>28</sup> Stearns, J. (2014). *Adult Home Resident Council Toolkit* [Pamphlet].

## **Tips to Maintain and Increase Participation**

1. Inform and invite new residents and residents who stopped attending or never attended meetings.
2. Have a well-known and consistent meeting time and place. For example, the second Wednesday of each month.
3. Make sure staff know which residents need staff assistance in getting to the meeting.
4. Be organized.
5. Publicize activities and accomplishments.
6. Hold membership drives.
7. Run meetings efficiently.
  - Meetings that are disorganized, don't stick to schedule, and let a few people control the conversation discourage participation.
  - Allow all to contribute but follow the agenda.
8. Follow up.
  - Check in with people who had ideas and issues that were not resolved at the meeting.
9. Recognize the work of participants.

Publicize council meetings on the activity calendar and in other ways like flyers or reminders.

## **Effective Meetings Tips**

Running effective meetings will help to keep participation and morale high.

1. Create a culture of respect.
  - Talk about what respect looks like as a group.
  - Decide on shared expectations such as only one person speaking at time, staying on topic, and not having side conversations.
  - Have a facilitator who can gently redirect the conversation when needed.
  - Thank members and participants for their work and time.
2. Advertise clearly and noticeably.
3. Be prepared.
  - Have an agenda (see page 36) and stick to it.
  - Have clear goals and objectives.
  - Know who will be leading the meeting and taking the minutes.

- Make sure members understand the parliamentary procedures.
  - Have the tools needed to make the meeting accessible for everyone.
4. Explain the meeting process.
    - Start each meeting by briefly going over the agenda and rules.
    - Explain clearly how to participate.<sup>29</sup>
    - Have a way for nonmembers or people who want to discuss items not on the agenda to have some time to speak or submit their ideas in writing.
  5. Start and end on time.
  6. Present facts and challenge rumors.
    - The council has the responsibility to represent residents. Keep the meetings professional and goal based. Encourage individuals to advocate for themselves on personal issues by providing them with resources.
  7. Wrap up with action items and next steps.
  8. Follow up.

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<sup>29</sup> PlannersWeb. (2014). PlannersWeb.com.  *Holding Effective Public Meetings*. Retrieved July 21, 2016, from [plannersweb.com/2014/10/holding-effective-public-meetings](http://plannersweb.com/2014/10/holding-effective-public-meetings).

- Post minutes where all residents and staff have access to them.
- Meet privately with participants who had lingering concerns.<sup>30</sup>

#### 9. Recognize contributions.

- Thank current and exiting members, staff, volunteers, and other people that have helped the council.<sup>31</sup>

### **Resident Council Story**

Residents had many questions about voting in an upcoming national election and what documents they would need to vote. They set up a time when the home's business office manager could speak at a council meeting about what they need to vote, how they can vote, and how the home will help them vote.

In addition to voting, the residents also decided to contact their city representative about an issue affecting their neighborhood.

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<sup>30</sup> PlannersWeb. (2014).

<sup>31</sup> Kerr, E. W., Brown, M., & Clarke, D. (2005).

## **Agendas**

Agendas inform participants, organize meetings, make sure that all tasks are completed, and record what happens.

Simple agendas are best. Include the time, date, and location of the meeting, the times when topics will be discussed, and the time when the meeting will end.

Include a specific time for any person to talk about any topic for a set time (usually two to five minutes per person). This helps keep the rest of the meeting on topic and gives everyone a chance to participate.

See page 62 for a sample agenda.

## **Minutes**

Keep accurate records of what happens at meetings. The record-keeper is usually the Secretary. If there is no Secretary, choose someone else to take the minutes. See pages 63-65 for sample council minutes.

### **Tips for Minutes**

1. Minutes should be brief, complete, and legible.
2. Minutes should contain:

- the name of the person presiding;
  - members present;
  - who took the minutes;
  - date and time of the meeting; and
  - items discussed, actions taken, and date and time of next meeting.
3. Minutes should be available for those that want to see them.<sup>32</sup>
  4. Minutes DO NOT have to include the name of the person making a comment, complaint, or request.
  5. If someone asks to remain anonymous, DO NOT include the person's name in the minutes.

Simple agendas are best. They inform participants, organize meetings, make sure that all tasks are completed, and accurately record what happens.

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<sup>32</sup> Kerr, E. W., Brown, M., & Clarke, D. (2005).

# **Respectful Meetings and Conflict Resolution**

## **Tips for Respectful Meeting**

1. Set expectations for meeting that members agree with. For example, no cell phone use and only one person speaks at a time.
2. Concentrate on what the person is saying.
3. Ask questions if you do not understand. See page 66 for active listening skills.
4. Choose a chair or president who can keep calm, redirect the conversation if needed, and keep the tone respectful.

## **Tips for Conflict Resolution**

1. Use the respectful meeting tips above and remind members of expectations.
2. Recognize frustration (change in tone, rolling eyes, etc.) and acknowledge everyone's concerns.
3. Look for the cause of the conflict.
4. Remind everyone that you have shared interests – making a better resident experience.

5. Give everyone a chance to speak. Ask questions and listen to the concerns of all.
6. Suggest taking a break from the topic.
7. Stop or reschedule the topic if conflict becomes unprofessional.<sup>33</sup>

Ask your ombudsman for ideas and support if needed.

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<sup>33</sup> MindTools. [online]. *Managing Conflict in Meetings: Handling Disagreements on the Spot*. (n.d.) Retrieved July 26, 2016, from [mindtools.com/pages/article/newTMM\\_65.htm](http://mindtools.com/pages/article/newTMM_65.htm)

## **Beyond the Basics**

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Once your council is established take time to evaluate your council's work and set goals.

### **Systems Advocacy**

Systems advocacy is the effort to make change throughout larger communities. This might be a facility change, neighborhood change, citywide change, statewide change, national change, and beyond.<sup>34</sup>

### **Examples of Systems Advocacy Activities**

1. Tell the resident story to lawmakers and decision makers by:
  - making visits to your legislator's office;
  - calling, writing letters, or emailing lawmakers and decision makers; and
  - testifying at hearings.
2. Educate other residents about important issues.
3. Educate people on how to register to vote and voting.

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<sup>34</sup> National Consumer Voice. (2016). *LTCOP Reference Guide: Role and Responsibilities of Ombudsman Programs Regarding Systems Advocacy*. Retrieved June 14, 2016, from [ltcombudsman.org/uploads/files/support/sltco-systems-advocacy-ref-guide-final.pdf](http://ltcombudsman.org/uploads/files/support/sltco-systems-advocacy-ref-guide-final.pdf).

4. Describe issues from the resident perspective to state agencies.
5. Organize events for other residents, staff, or community members.
6. Join other advocacy groups, such as the National Consumer Voice for Quality Long-Term Care, AARP, or the Center for Medicare Advocacy.

Focus on issues that a majority of members find important.

Ask your ombudsman for resources, tips, and suggestions on how to participate in systems advocacy.

## Evaluation

“One of the great mistakes is to judge policies and programs by their intentions rather than their results.”  
Milton Friedman

Evaluation means setting goals and measuring your council’s work. Evaluation of the council shows strengths and areas that need improvement. Use evaluation to celebrate accomplishments and fix problems.

## Ways to Evaluate Your Council

1. Count how many people have been attending meetings and actively participating over time.
  - Are you keeping and growing your participation numbers?
2. Create a survey for residents to fill out anonymously.
  - Are residents satisfied with the council?
3. List the activities you worked on and what changes were made.
  - What has the council accomplished?
4. Create a survey for staff, friends, and family members of residents.
  - What do others think of the council?

Use your findings to make changes, if needed, and report the accomplishments of the council.

## **Exercise: Four Councils**

### **Instructions**

Here are four examples of real councils. For each example, answer two questions.

1. What problem(s) does each council have?
2. What would you do to address these problems?

### **Council 1**

Residents are not very involved in council work. Sometimes they talk about a special meal or number of days to play bingo. Sometimes resident rights are read but there is never any discussion or questions. Residents never bring up concerns or complaints (see page 15 and pages 32-33 for help).

### **Council 2**

Only a few residents show up for council meetings. The activity director tries to get residents involved but there is little interest (see page 15 and pages 32-33).

### **Council 3**

Meetings have no structure. Often members just talk about problems without talking about what they can do to fix them (see page 44-47).

### **Council 4**

Many of the resident council members have trouble hearing and there are no tables for writing on (see page 12).

## **Common Concerns and Recommendations**

### **Meeting attendance is low.**

Make sure you are advertising and recruiting. Make sure the council is set up to meet the needs of all residents. Ask around, talk to new residents, and see if residents will talk about why they can't or don't want to participate.

### **Staff are not supportive of the council.**

Talk with staff one at a time or at a training for several staff members. Ask your ombudsman for help. Residents have the right to private and regular council meetings and the facility is required to help them. Hopefully it won't take more than education and talking with staff for them to become

more supportive of the council. However, if there is continued resistance, ask your ombudsman for help in advocating for your council.

**There is someone who “hijacks” every meeting and takes over the conversation.**

Choose a chair who can balance letting everyone contribute but not letting one or a few people take over the meeting. Have an agenda with timelines for each topic. Add a time at the end of each meeting for anyone to speak on topics of their choice. If a person is interested in a topic suggest they head a subcommittee and report back.

**Certain family or staff members want to attend every meeting.**

You can thank these friends or family members for their interest but remind them that people who are not residents only attend if invited. Say this in the bylaws and show family members or friends. Suggest they join or start a family council. If needed, the ombudsman can help council members communicate these things.

## **Someone can no longer fulfill his or her duties as an officer.**

The bylaws should contain policies and procedures for when someone can no longer fulfill his or her duties as an officer. If the bylaws do not, vote as a council.

## **The meetings turn into “gripe sessions” where everyone complains without solutions.**

Include agenda items that focus on actions and events. Celebrate accomplishments and plan events to give back or socialize. Set up a specific time when concerns can be heard and limit the amount of time each person can share, such as 2-5 minutes.

## **No ideas for projects and activities.**

There is always work councils can do. Talk to residents who do not attend council meetings for ideas and unmet needs. Ask your ombudsman for help finding activity ideas.

## **There seems to be a lack of dedicated leadership on the council.**

Try and understand the root cause of this problem. Are people not aware of the council? Is the council

mostly staff run? Do the positions require too much of one person? Work to solve these issues.

If residents have never been involved in a council before, they may be hesitant to take on a leadership role. Providing leadership education may increase resident willingness to participate in leadership roles.<sup>35</sup>

### **Staff are unresponsive to resident concerns.**

Facility staff are required to listen to and consider the complaints and suggestions of resident councils. Submit your concerns in writing. If you need help getting staff to respond, contact your ombudsman for support.

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<sup>35</sup> If a resident has never been involved in a resident council before, they may be hesitant to take on a leadership role. Providing leadership education may increase resident willingness to participate in leadership roles.

# Resources

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## Sample Resident Council Bylaws<sup>36</sup>

### **I. Name of Council**

The name of our resident council is [name of council].

### **II. Purpose**

The purpose of the resident council is to:

1. give residents greater participation in affairs within their own home;
2. suggest improvements and assist administration in providing better programs surroundings, and services;
3. promote friendship and understanding among residents; and
4. provide and receive necessary information for the benefit of all residents.

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<sup>36</sup> National Consumer Voice. *Sample Resident Council By-Laws*. Washington DC: National Consumer Voice, n.d. pdf. Retrieved July 25, 2016, from [theconsumervoice.org/uploads/files/events/SAMPLE-Resident-Council-Bylaws\\_\(1\).pdf](http://theconsumervoice.org/uploads/files/events/SAMPLE-Resident-Council-Bylaws_(1).pdf)

### **III. Membership**

Every resident of [name of facility] is a member of the resident council. Every member shall be given the opportunity to vote.

Note: Some councils have representative council members from each wing, building, or floor who make up the council. This structure needs to be developed before bylaws are written.

### **IV. Officers and Their Duties**

Officers of the council will be:

1. President (Chair) – Presides over all meetings;
2. Vice President (Vice Chair) – Presides over meetings in the absence of the President;
3. Secretary – Records and maintains minutes of each meeting; and
4. Treasurer – Manages all financial business of the council.

Officers of the council shall be elected every [period of time such as every year or every six months] in [name of month elections are held].

## **V. Committees**

### **Executive Committee**

The council shall have an Executive Committee whose purpose is to give direction and organization to the council.

The Executive Committee will include [List members here.]

Note: Members usually include council officers, and if the council so chooses the committee chairs.

### **Standing Committees**

The Council shall also have the following standing committees as needed [list standing committees]:

#### **Welcome Committee**

Greet new members and orient them to the facility.

#### **Sunshine Committee**

Prepare greeting cards for residents in the hospital and those who have birthdays; and send cards to families who have lost a loved one.

#### **Activity Committee**

Serve as a liaison with activity staff to plan and set up recreational programs.

## **Grievance Committee**

Listen to concerns and provide an opportunity for discussion before the full council meets; follow up on complaints with the administrator or the ombudsman.

Each standing committee will select a chairperson who will serve for [list the period of time].

Temporary committees can be established by appointment or as needed.

## **VI. Elections**

Elections of officers or representatives will be held every [name the month of election].

Elections will be conducted using written ballots listing nominations for each office. Nominations will be made at the meeting prior to the election.

In the event that an officer is or becomes unable to fulfill his or her duties, a special election will be held at the next regularly scheduled council meeting.

## **VII. Meetings**

General meetings of the Council will be held every [list a specific day, time, location].

Note: If you have executive meetings or committee meetings, list the day, time, and location for those as well.

### **VIII. Amendments**

Amendments may be made to the bylaws at any regular or special meetings of the council by a 2/3 vote, providing suggested changes have been read at the previous meeting.

Amendments will go into effect immediately.

### **IX. Rules of Order**

Each general meeting will be conducted according to a written agenda. Robert's Rules of Order will be followed unless the council wishes to change or add to the rules based on the determination of the group.

See Robert's Rules 101 - Seven Steps graphic on the next page.

## Robert's Rules 101 – Seven Steps



Figure 1 - Robert's Rules 101

Keep meetings on track. Bylaws are the rules that a council follows. The council should have bylaws available during meetings for questions about rules or procedures (Adapted with permission from PTO Today, Robert's Rules Tip Sheet.).

## Voting Procedures Overview

### Use Robert's Rules of Order to Keep Meetings on Track<sup>37</sup>

1. Member makes a motion - "I move that we change the regular council meeting date. Fridays are too busy."
2. Another member - "*I second that motion.*"  
Every motion needs a second motion.
3. Discussion - "Another day would be better."
4. Amendment - "I move that meetings should be on Mondays."
5. Discussion - "I agree. This is a good idea."
6. Vote on the amendment - Amendment passes.
7. President calls for a vote - "On the motion to reschedule meetings to Mondays, aye or nay?"
8. Vote on amended motion - Motion passes.
  - Secretary tallies the votes - Majority rules.
  - No cross talk. Members must speak directly to the chair.

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<sup>37</sup> Adapted with permission from Robert's Rules Tip Sheet at [www.PTOToday.com](http://www.PTOToday.com).

# How to Accomplish What You Want to Do in Meetings<sup>38</sup>

## Parliamentary Procedure - Cheat Sheet

### Main Motion

You want to propose a new idea or action for the group.

1. After recognition, make a main motion.
2. Member: "Madame Chairman, I move that ..."

### Amending a Motion

You want to change some of the wording that is being discussed.

1. After recognition, "Chairman, I move that the motion be amended by adding the following words ..."
2. After recognition, "Chairman, I move that the motion be amended by striking out the following words ..."
3. After recognition, "Madame Chairman, I move that the motion be amended by striking out

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<sup>38</sup> Kennedy, B. (1997). *Roberts Rules Cheat Sheet*. Robert's Rules. (pdf) The Dialectic and Philanthropic Societies. University of North Carolina. Retrieved July 21, 2016, from [diphi.web.unc.edu/wp-content/uploads/sites/2645/2012/02/MSG-ROBERTS\\_RULES\\_CHEAT\\_SHEET.pdf](http://diphi.web.unc.edu/wp-content/uploads/sites/2645/2012/02/MSG-ROBERTS_RULES_CHEAT_SHEET.pdf).

the following words, ..., and adding in their place the following words ..."

## **Refer to a Committee**

You feel that an idea or proposal being discussed needs more study and investigation.

- After recognition, "Madame Chairman, I move that the question be referred to a committee made up of members Smith, Jones, and Brown."

## **Postpone Definitely**

You want the membership to have more time to consider the question under discussion and you want to postpone it to a definite time or day, and have it come up for further consideration.

- After recognition, "Madame Chairman, I move to postpone the question until ... "

## **Previous Question**

You think discussion has gone on for too long and you want to stop discussion and vote.

- After recognition, "Madam President, I move the previous question to vote."

## **Limit Debate**

You think discussion is getting long, but you want to give a reasonable length of time for consideration of the question.

- After recognition, "Madam President, I move to limit discussion to two minutes per speaker."

## **Postpone Indefinitely**

You want to end a motion that is being discussed.

- After recognition, "Madam Moderator, I move to postpone the question indefinitely."

## **Postpone Indefinitely**

You are against a motion just proposed and want to learn who is for and who is against the motion.

- After recognition, "Madame President, I move to postpone the motion indefinitely."

## **Recess**

You want to take a break for a while.

- After recognition, "Madame Moderator, I move to recess for ten minutes."

## **Adjournment**

You want the meeting to end.

- After recognition, "Madame Chairman, I move to adjourn."

## **Permission to Withdraw a Motion**

You have made a motion and after discussion, want to withdraw it.

- After recognition, "Madam President, I ask permission to withdraw my motion."

## **Call for Orders of the Day**

At the beginning of the meeting, the agenda was adopted. The chairman is not following the order of the approved agenda.

- Without recognition, "Call for orders of the day."

## **Suspending the Rules**

The agenda has been approved and as the meeting progressed, it became obvious that an item you are interested in will not come up before adjournment.

- After recognition, "Madam Chairman, I move to suspend the rules and move item 5 to position 2."

## **Point of Personal Privilege**

The noise outside the meeting has become so great that you are having trouble hearing.

1. Without recognition, "Point of personal privilege."
2. Chairman: "State your point."
3. Member: "There is too much noise, I can't hear."

## **Committee of the Whole**

You are going to propose a question that is likely to be controversial and you feel that some of the members will try to end it by various maneuvers. Also, you want to keep out visitors and the press.

- After recognition, "Madame Chairman, I move that we go into a committee of the whole."

## **Point of Order**

It is obvious that the meeting is not following proper rules.

- Without recognition, "I rise to a point of order," or "Point of order."

## **Point of Information**

You are wondering about some of the facts under discussion, such as the balance in the treasury when expenditures are being discussed.

- Without recognition, "Point of information."

## **Point of Parliamentary Inquiry**

You are confused about some of the parliamentary rules.

- Without recognition, "Point of parliamentary inquiry."

## **Appeal from the Decision of the Chair**

- Without recognition, "I appeal from the decision of the chair."

# Vision, Values, and Mission Worksheet

Our vision is a community where:

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Five of our shared values are:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Our mission is to: \_\_\_\_\_

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## **Sample Agenda for Sunnydale Resident Council**

March 4th, 2021, 1:30 pm

Sunnydale Meeting Room B

1:30 - Call to Order, Welcome, and Introductions.

1:35 - Roll Call.

1:40 - Reading of Last Meeting's Minutes.

1:45 - Committee Reports: Standing, then temporary committees give reports.

2:00 - Unfinished Business: Introduction of new topics, ideas, suggestions, and votes.

2:15 - Citizen Communication: Limit to two minutes per person.

2:20 - Announcements: Informing the council of other subjects and events.

2:30 - Adjourn: The meeting comes to an end by majority consensus.

# Sample Council Meeting Minutes<sup>39</sup>

Name of Council \_\_\_\_\_

## Council Meeting Minutes

1. [Month, Day, and Year]
2. [Time and location]

## Board Members

Present: Jerry Smith, Mary Parker, Elizabeth Drucker, Pat Kyumoto, Jack Porter, Mary Rifkin, and Leslie Zevon;

Quorum present? Yes

Others Present: Staff Representative, Sheila Swanson

## Proceedings

Meeting called to order at 1:30 p.m. by Chair, Elizabeth Drucker.

(Last month's) meeting minutes were amended and approved.

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<sup>39</sup> McNamara, C. (2016). Authenticity Consulting, LLC. [online] *Basic Sample of Board of Directors' Meeting Minutes*. [online]. Adapted from the *Field Guide to Developing and Operating Your Nonprofit Board of Directors*. (n.p., n.d.). Retrieved July 21, 2016, from [cdn2.sportngin.com/attachments/document/0092/1048/BoardMinutes.pdf](http://cdn2.sportngin.com/attachments/document/0092/1048/BoardMinutes.pdf). [[managementhelp.org](http://managementhelp.org)].

## **Chair's Report**

1. Recommends that council should continue efforts to inform other residents of their voting rights. After brief discussion, council agreed.
2. Swanson mentioned that staff member, Sheila's husband is ill and in the hospital.
3. MOTION direct the Sunshine Committee to send handwritten cards to Shelia's husband, expressing the council's sympathy and support
4. MOTION seconded and passed

## **Grievance Committee's Report**

Provided by Chair, Jerry Smith.

Smith explained that several residents have come forward to complain about the lack of choices for breakfast.

1. MOTION to compile the complaints and present to staff
2. MOTION seconded and passed

## **Volunteer Service Committee's Report**

Provided by Chair, Mary Rifkin.

Rifkin updated the council about the committee's work to make blankets for the homeless; she

explained the council would like to begin a food drive for the month of November.

1. MOTION to begin a food drive in November;  
seconded
2. DISCUSSION several members had concerns about how the planning would go
3. MOTION to assign the volunteer services committee to plan the details and report back to the committee
4. MOTION seconded and passed

### **Citizen Communication**

Jones from the third floor explains they have been having temperature issues and that it is too hot in the summer months.

1. MOTION for Jerry Smith to meet with Mrs. Jones and facility staff and report back
2. MOTION seconded and passed

### **Assessment of the Meeting**

Drucker noted that the past three meetings have ended on time. She thanked the members for being mindful of the agenda and time in their discussions.

Meeting adjourned at 2:30 p.m.

Minutes submitted by Secretary, Mary Parker

## **Active Listening Skills**

Active listening ensures you are being attentive to the speaker and truly hearing and understanding what they are communicating.

### **Signs of Active Listening**

1. Smiling;
2. Making eye contact;
3. Listening without jumping in to respond or thinking up a response;
4. Mirroring facial expression and body language;
5. Maintaining open and calm posture;
6. Being free of distraction;
7. Remembering;
8. Questioning;
9. Reflecting;
10. Clarifying;
11. Summarizing.

### **Say These Things**

1. What I hear you saying is...
2. Can you tell me more about...?
3. Are you saying...?

4. [Say the person's name], let me see if I have this right...
5. I am going to summarize this conversation to make sure I understand.
6. It sounds like it is important to you that....

### **Do Not Say These Things**

1. I know how you feel.
2. If I were you...
3. I think...
4. My advice is...
5. You should have...
6. I understand.

# Speaking and Listening Effectively During Conflict<sup>40</sup>

## Speaking Skills

**Skill 1:** Share your story using a calm voice and describe events in chronological order.

**Skill 2:** Keep your statements short.

**Skill 3:** Use “I” statements rather than “You” statements.

**Skill 4:** Use sentences, not questions.

1. Example: “I worry when you are late.”
2. As opposed to: “Why are you late again?”

**Skill 5:** Be polite and patient: ask them how you can help them.

**Skill 6:** Be a good listener.

## Listening Skills:

**Skill 1:** Edit out your typical first response.

**Skill 2:** Just listen. Don’t mentally “rehearse” your speech or prepare your rebuttal.

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<sup>40</sup> Beebe, S., Lennox Terrion, J., & Beebe, S. (1997). *Interpersonal communication, relating to others, Canadian edition [by] Beebe, Beebe, Redmond, Milstone* (pp. 111-193). Scarborough, Ont.: Prentice-Hall.

**Skill 3:** Do not confuse understanding with agreement.

**Skill 4:** Understanding happens only when the other person feels understood.

**Skill 5:** Non-verbally let the other person know you are “with” him or her.

**Skill 6:** Look at the person speaking.

- Find a quiet place to talk.
- Face the person who is speaking.
- Nod your head in agreement when you agree.

## Sample Grievance Form

Residents, staff, or family members may use a grievance form to file a formal complaint with the council. The council votes on whether to submit the grievance to the home's management.

Date grievance received: \_\_\_\_\_

### Grievant's Information

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Room Number: \_\_\_\_\_

Email: \_\_\_\_\_

### Grievance Information

Date of occurrence: \_\_\_\_\_

State the policies, procedures, or rules that were violated.

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Please give a detailed account of what happened.

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What remedy do you suggest?

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By signing below, I indicate that the information contained on this form is true and factual to the best of my knowledge.

Grievant's Signature

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Date Signed: \_\_\_\_\_

Receiving Council Member's Signature:

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Date Signed: \_\_\_\_\_

For more information, call  
**800-252-2412**  
or email  
[ltc.ombudsman@hhs.texas.gov](mailto:ltc.ombudsman@hhs.texas.gov)



**State Long-Term Care  
Ombudsman Program**

*Long-term care ombudsmen advocate for  
residents and are separate from HHS.*