



POWERFUL FAMILIES: ADVOCACY IN ACTION

Toolkit

Developed for:

**Casey Family Programs
Seattle, Washington**

Developed by:

**Jemmott Rollins Group, Inc.
Los Angeles, California
December 2006**

This *Powerful Families: Advocacy in Action Toolkit* supports the “Powerful Families: Advocacy in Action Workshops” conducted by Casey Family Programs. Each workshop session contains a set of take-away tools derived from the exercises experienced. The take-away tools can be used to prepare for an advocacy situation when it arises or to practice skills with families or peers. Like sports, cooking, riding a bike, etc., advocacy involves a set of skills that will improve with practice.

Powerful Families: Advocacy in Action (www.powerfulfamilies.org) promotes self-help and advocacy to help families:

- ❖ get better services
- ❖ improve communications with service providers
- ❖ prevent some problems encountered with big impersonal systems; and
- ❖ reduce family stress

Each workshop session focused on knowledge and skills that encourage advocacy. Together, the knowledge, skills and materials constitute a “toolkit” intended as a handy resource when advocacy situations arise.

This toolkit uses tools that are different from those found in a home “fix-it” kit. Instead of screwdrivers, hammers, glue, tape and nails, our tool kit uses some tools such as communication skills for “active listening” and negotiations. The “skill tools” require “knowledge tools” in order for them to work well. The knowledge tools are facts learned about entitlements and policies that govern resources available to family members. The knowledge tools also help participants know when and how to advocate, what documents are helpful in advocacy situations, and how to move through complex systems to get problems “fixed”.

Advocacy is defined as: the act of pleading or arguing in favor of something, such as a cause, idea, or policy; active support.

When advocating for yourself, your family, or your community you are pleading or arguing for something important to health, safety, well-being or quality of life. In everyday situations, it is important to promote our own best interests and those of our children and other family members. When we are unaware of our rights and entitlements, and when we fail to stand up for ourselves and our children, predicaments can result that are very challenging. Early and effective advocacy can be very helpful when we are in need of support or services. The Advocacy in Action Toolkit is intended to help you with situations in the following areas:

Housing	Criminal justice systems
Education	Employment
Healthcare and Mental Health Services	Child care
Financial Management	Domestic violence situations
Social and Child Welfare Services	Achieving Goals
Transportation	Forming social networks
Nutrition services	Overcoming fears



The first Advocacy in Action session focused on communication skills. Talking, listening and observing are three basic ingredients in self-advocacy and in advocating for others. Try using the following guidelines to practice these skills with family or peers.

COMMUNICATION TOOLS

Talking :

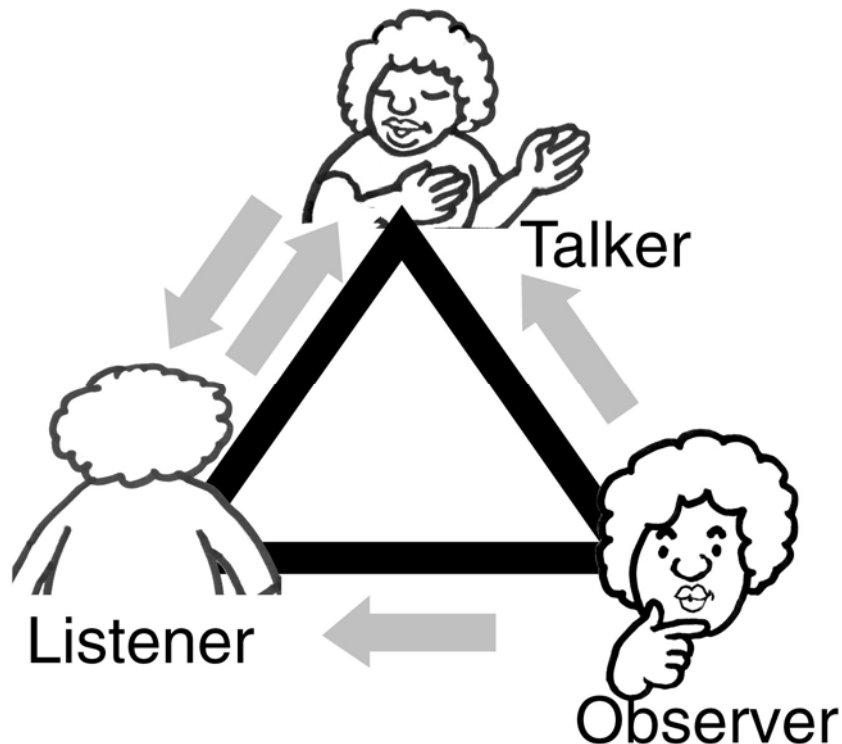
- Clear your mind and focus on what you are about to say.
- Look at the person(s) with whom you are speaking.
- Maintain eye contact.
- Use gestures that convey the emotional content of your talking points.
- Talk in paragraphs of four or five sentences; try not to ramble.
- Talk in sequence or chronological order: beginning, middle, end or what happened first, next, last.
- Stop periodically to make sure your points are registering with the listener(s).
- Be honest with yourself and to the extent possible with others to the extent possible.

Listening:

- Focus all of your attention on the person speaking.
- Establish and maintain eye contact.
- Avoid fidgeting and becoming distracted by thoughts or activities.
- Give non-verbal feedback to the talker that you understand what is being said: smile, nod, etc.
- Give non-verbal feedback to demonstrate empathy or concern furrowed brow, sad face, etc.
- Let your shoulders relax, your arms hang loose and relaxed and keep your feet/legs uncrossed and flat on the floor as much as possible.

Observing:

- Remain quiet and attentive while others do the talking and listening;
- Observe the body language of both the speaker and listener.
- Look for signs of sincerity, honesty, and willingness to solve a problem.
- Look for signs of defensiveness, silliness, inappropriate language or other poor communications skills.
- Give the talker and listener feedback about what you observed.



SAMPLE PRACTICE SESSION

The purpose of this exercise is to remind us to practice the three elements of effective communication as often as possible. Try to recreate “the triangle” used in the workshop. Encourage everyone to talk about a real situation. Use the following steps as a guide.

Step 1. Gather at least three members of your household or peers.

Step 2. Ask each person to choose their starting position (Talker, Listener, Observer).

- a. **The Talker** – Take 3 minutes to tell the listener(s) something significant about yourself.

Sample Script: “*One significant thing about my life right now is my goal to graduate from high school. I really want to graduate, but I don’t have all the credits needed. Since I’m working after school at McDonald’s, I can’t figure out whether I should quit my job and take classes at the adult school to finish the credits or just go back next September and be the oldest dude in the school. I want to go to the prom, go to graduation and party with everybody; I’ll need the money from my job to do that*”

- b. **The Listener** – Establish and maintain eye contact with the talker; use positive body language to indicate that the talker is understood; avoid interruptions or questions. Takes 1 or 2 minutes to give feedback to the talker.

Sample Script: “*I can see this is a very significant issue for you. I hear you saying that graduation is very important and you want to graduate on time with your class. I also hear that you need a few more classes to graduate. You can either quit your job and take the classes now and graduate on time or do another semester in September and keep your job. It also sounds like you need the money from your job to pay for the fun part of graduation. That is such a hard choice. I don’t want to give you advice because it’s your decision, but I’m happy that you shared this problem. Maybe if you talk to your teacher, the counselor and the manager at your job, they can give you some other choices. Let’s keep talking about this—I’m here for you.*”

- c. **The Observer** - Tell the Talker and the Listener how the conversation went from your point of view.

Sample Script: “*Talker, you were so sincere and really came across as being honest with yourself and Listener about this challenge. At times you mumbled and looked down at the ground so it was hard to hear you. I like the way you balanced both sides of the problem.*”

“Listener, you were very attentive and tried to keep eye contact even when Talker looked at his sneakers. You smiled and nodded that you understood and you avoided trying to solve the problem for talker. Instead you came across as very sincere like you could feel how Talker felt and like you would accept whatever choice Talker made.”

Step 3. Switch roles until everyone has had a chance to play the Talker, the Listener and the Observer.

Step 4. Stop the exercise and discuss:

- ❖ How did it feel to be the Talker?; The Listener?; The Observer?
- ❖ What role is most challenging?
- ❖ What role did you like most?
- ❖ What would you do differently the next time?

2 THE IMPORTANCE OF GROUPS



In this session, workshop participants focused on the different types of groups and how our behavior needs to adapt to the type of group we're in. Different group settings can help us practice our communication skills.

COMMUNICATION TOOLS: TYPES OF GROUPS

1. Different Group Settings Offer Opportunities to Use Different Skills.

A.

Type of Group	Purpose	Examples
Social	To enjoy each other's company	Birthday parties; holiday's events; hanging out

In social groups, we practice talking in a friendly manner: telling jokes, complimenting each other's style of dress, and making one another feel included.

B.

Type of Group	Purpose	Examples
Discussion	Plan; discuss issues; learn new perspectives	Dinner conversations; peer interaction

In discussion groups, we practice how to ask questions and actively listen to other points of view. We discuss issues important to our lives without having to be experts. We agree and disagree without becoming angry.

C.

Type of Group	Purpose	Examples
Education	To learn from an expert; acquire factual knowledge	Parenting programs; anger management classes; driver education

In education settings, there is usually an expert who has in-depth knowledge about a topic; we focus our attention on the speaker, take notes, ask questions and keep our minds open to new information.

D.

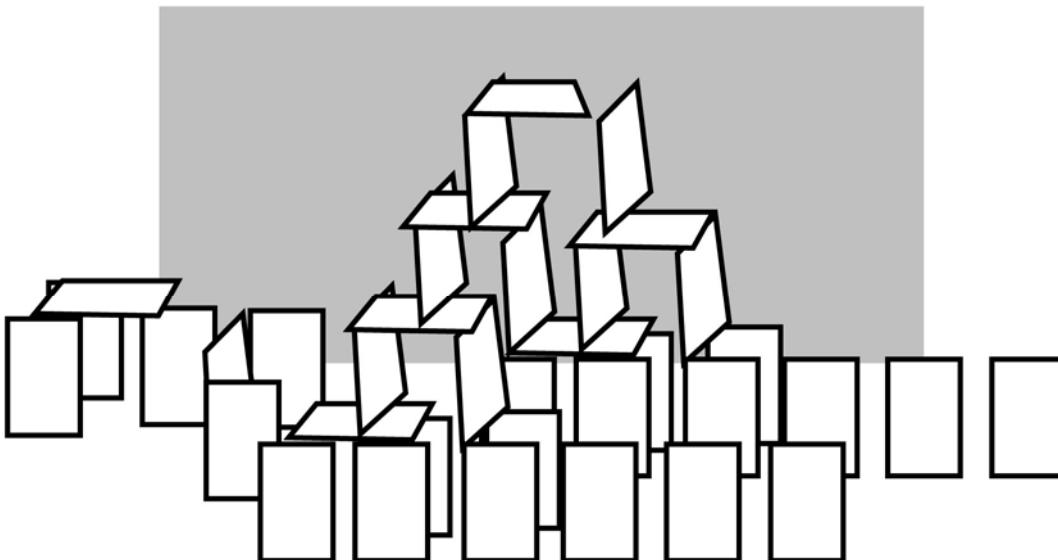
Type of Group	Purpose	Examples
Support	To encourage and support	Problem solving; grieving a loss; encouraging new goals

A support group consists of peers who share common concerns and help each other cope or improve. In these groups we practice active listening and empathy and also how not to judge and advise.

E.

Type of Group	Purpose	Examples
Task	To accomplish an objective; to work as a team to complete a project	Committees; families

In task groups, we learn how to plan and carry out plans that contribute to fulfilling goals. We learn cooperation and leadership skills as well. Task groups often involve long-term commitments.



2. Key Points about a Task Group

The task group can be the most demanding group. It's more complex because it requires our participation with others in completing work and often extends over long periods of time. The family is a task group in which we participate over a life time. Use the following guidelines when trying to improve communications in a task group:

- Make sure you understand the task.
- Insist that the group take time to plan; tasks are 80% planning and 20% doing.
- Give input on how to complete the task.
- Contribute your ideas to a common vision.
- Experiment - use trial and error to test ideas.
- Agree on a final plan.
- Take on a role and responsibility and give it your best.
- Focus.
- Encourage others.
- Participate to the fullest.
- Enjoy the result.
- Learn from the experience.
- Evaluate your participation – e.g., what would you do differently the next time?

SAMPLE EXERCISE

Form a task group among family members and/or peers. Play “The Tower Game” as we did in the session on groups. This practice session will reinforce the skills needed in a task group. Use the following guidelines as we did in the workshop. You will probably build only one “tower” instead of three or four, but important lessons will still be learned.

- Gather three or more people around the table.
- Use leftover index cards and tape from the workshops if available. Put the cards and tape in the middle of the table.
- Assign a timekeeper. Allow 10 minutes to complete the task.
- Give the task: “Using the materials provided, build the tallest free-standing tower possible.”
- Provide time pressure by counting down the minutes and seconds.
- Call “time” and ask everyone to stand back and admire the tower.
- Help everyone discuss the key points about participation in task groups.

HELPING TOOLS

1. Giving Help

When a family member or peer asks for assistance with a personal challenge or problem they become a help seeker and you are in the position to become a help giver:

- Listen attentively; use active listening skills.
- Restate what you heard.
- Confirm that you understand the help requested.
- Put the other person at ease: “I understand what a challenge this is for you”.
- Try to put yourself in their place/space.
- Avoid making the conversation about you; stay focused on the help seeker.
- Avoid the urge to “rescue” the help seeker by taking ownership and solving the problem.
- Discuss possibilities.
- Relate experiences and lessons learned from your own background if appropriate.
- Encourage careful thought about possible options.
- Try to narrow the options to a few choices.
- Select an A choice and a B choice.
- Assist by asking what next steps are.
- Be gentle and caring throughout.
- Give an opinion about the stated plan of action and expected outcome.
- Be positive and realistic about the plan; recommend a higher level of help if skeptical.
- Agree to maintain confidentiality.
- Confirm a time to follow up.
- Praise the help seeker for finding courage to address their challenge.

The ability to remain non-judgmental and accepting of the help seeker is crucial to easing their fears about disclosing problems.

2. Asking for Help

When you find yourself in a state of confusion about a predicament or problem, seek help from a trusted peer or other person. Try to seek help before a predicament turns into a crisis. Remember how helpful you were when asked and expect to receive support and relief by asking for help.

- Ask for time to sit quietly and talk.
- Select a setting where you will be at ease and not distracted.
- Use talking skills to present the issue for discussion.
- Present your situation and state your belief that you believe it can be resolved.
- Ask the help giver to listen to the options under consideration.
- Ask the help giver to relate their experiences with a similar situation.
- Remain positive and hopeful.
- Stay focused on one issue at a time.
- Ask for the level of confidentiality you need and expect.
- Remain open and try not to be defensive.
- State a plan of action you are willing to try.
- Agree to follow up with the help giver after you have tried the plan.
- Appreciate the help giver for their time and attention.
- Give yourself a big hug for finding courage to seek help!

If you are still not comfortable with these guidelines for giving and seeking help, try to check in with the group facilitators from the Advocacy In Action workshop. They may have more useful suggestions.



4 FORMING OR JOINING SUPPORT GROUPS



In this session, we switch from communication tools to research tools for your toolkit. According to the Cambridge On-line Dictionary, research means: a detailed study of a subject, especially in order to discover (new) information or reach a (new) understanding.

In order to learn more about how you might form or join a support group, research is necessary. In the Advocacy in Action workshop, the group discussed the value of support groups and practiced being in a support group. As suggested in this tool kit, your communication tools will improve with practice and support groups offer an accessible, free (or very low-cost) and friendly place to practice communication skills. Of course, there are other reasons to form or join a support group.

Support groups offer participants the opportunity to regularly exchange information with peers who share the same or similar concerns. They also offer the kind of comfort and support that comes from knowing that you are not the only one who has a problem or predicament. Scientific research has shown that people who regularly participate in support groups recover more quickly from some diseases, have a brighter outlook on life and feel less lonely and isolated.

RESOURCE GROUPS

To locate a support group become familiar with the following resources.

Internet

Using the Internet Browser, type in www.google.com

Google.com is a search engine that allows you to enter key words to specifically describe the resource you are looking for.

For example: Parenting support groups King County Washington USA connects you to this link: <http://www.dexonline.com/sem?city> that contains a listing of thousands of support groups throughout Washington State. (This type of service varies according to states and the type of request entered on Google.com.)

Using that index or one of the other listings, continue to search for a specific group in your community.

Local Telephone Directories

Using the Yellow or Business Pages, look for the Community Services Section that offers referral services for a variety of social issues.

You will find listings under titles that describe a general condition or problem. For example: Senior services, Recovery Programs, and Child Care are headings that could lead directly to organizations that provide support groups or refer callers to support groups.

Newspapers

In many community newspapers, listings of support groups can be found in community services pages. The large, daily newspapers usually have a section in the Lifestyle, Health or Neighborhood sections that appear once a week. Call the newspaper for more information.

SUPPORT GROUP LISTINGS

Fill in the names and telephone numbers of organizations that offer support groups for issues that you, your family and/or peers might want to check out.

Organization	Contact Person	Telephone
--------------	----------------	-----------

Organization	Contact Person	Telephone
--------------	----------------	-----------

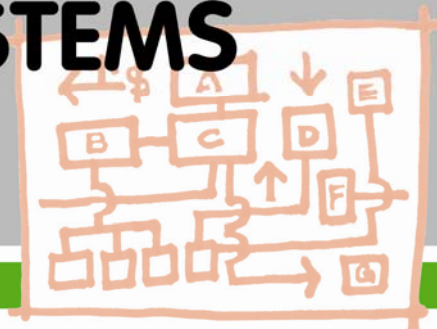
Organization	Contact Person	Telephone
--------------	----------------	-----------

Organization	Contact Person	Telephone
--------------	----------------	-----------

Organization	Contact Person	Telephone
--------------	----------------	-----------

Learning how to communicate in a variety of settings strengthens our skills as advocates. We become accustomed to interacting with others, sharing ideas and problems and giving and accepting help. We also learn that many people have had experiences similar to our own and learned to overcome challenges in their lives. This perspective is very useful as we develop the belief that we too can succeed in overcoming challenges.

5 UNDER- STANDING SYSTEMS



SYSTEMS MAPPING TOOL

Effective advocacy requires an understanding of how systems work and how to move through a system to obtain a desired result. Education, child welfare and health care are examples of systems that families often work within. Taking time to map out a system helps us better understand the choices we have as individuals and families.

Look at the sample systems map on the next page. It is typical of an educational system. In order to resolve an important problem, it is often necessary to move the issue to other levels within the system. Here is a sample problem:

My child attends third grade at the neighborhood elementary school. He is very bright and seems well ahead of his class in many subject areas. I understand that other schools in our district offer more challenging work and better programs. While these schools are further from our home, I would like to consider transferring my child to another school. I asked a neighbor if she knew anything about this process. She told me when she inquired for her child she was told it was not possible because our current elementary school was losing too many children that way.

Use the systems mapping template (following the systems map) to create a map for a system you need to navigate or move through. After filling in as much information as possible on the template, ask yourself and others close to you, the following questions.

Key Questions to Ask

- Do we understand how the policies are created in the systems we access?
- Do we have contact with at least two key persons who can act as a resource and support within the system?
- What information do we need in order to successfully move an issue to resolution in this system?

Try to keep the following information about systems in mind when you start to engage a system. Navigating your way through a system can often be much easier with an advocate who knows that system well.

SYSTEMS MAPPING

EDUCATION SYSTEM:

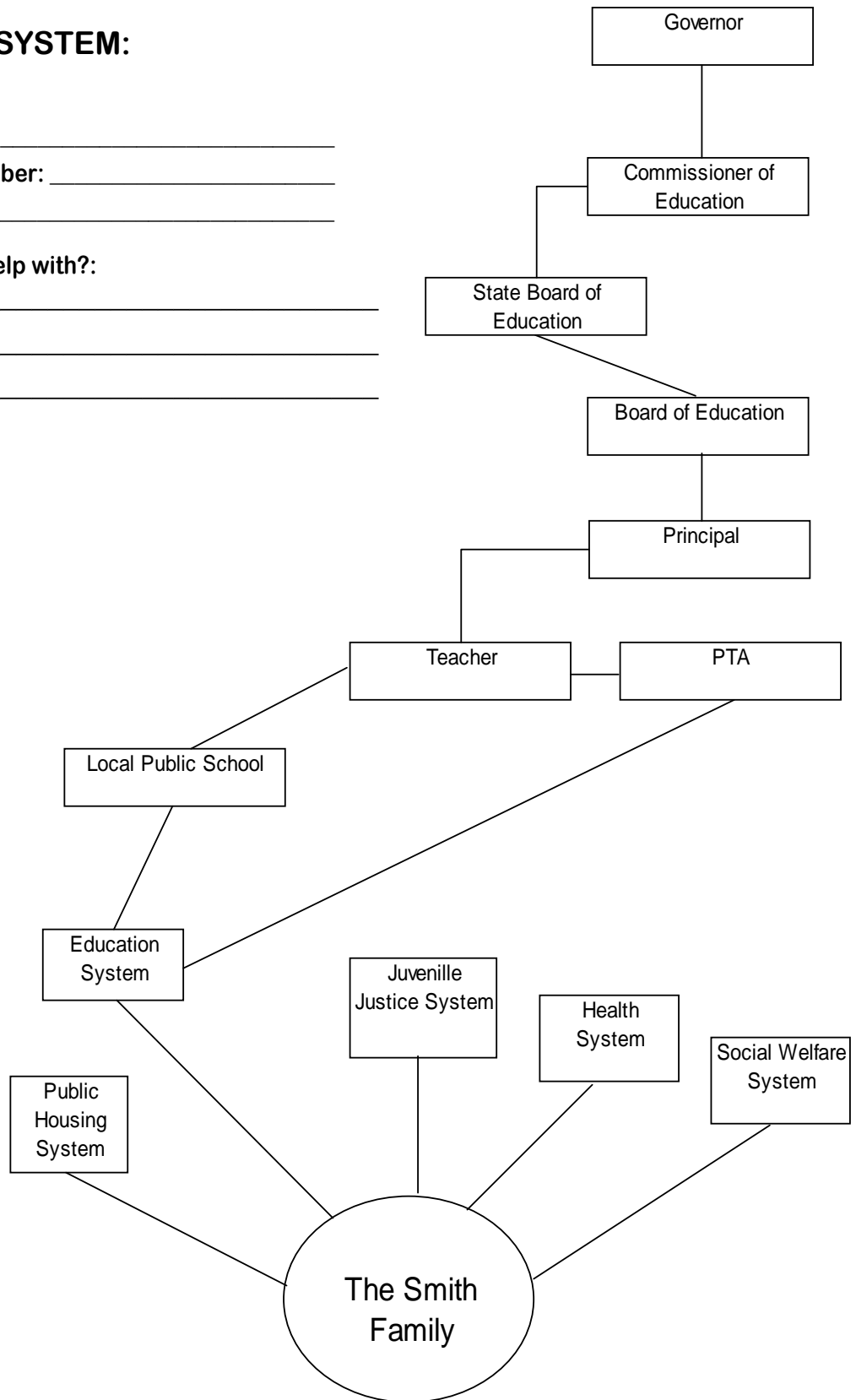
Local Contacts:

Name: _____

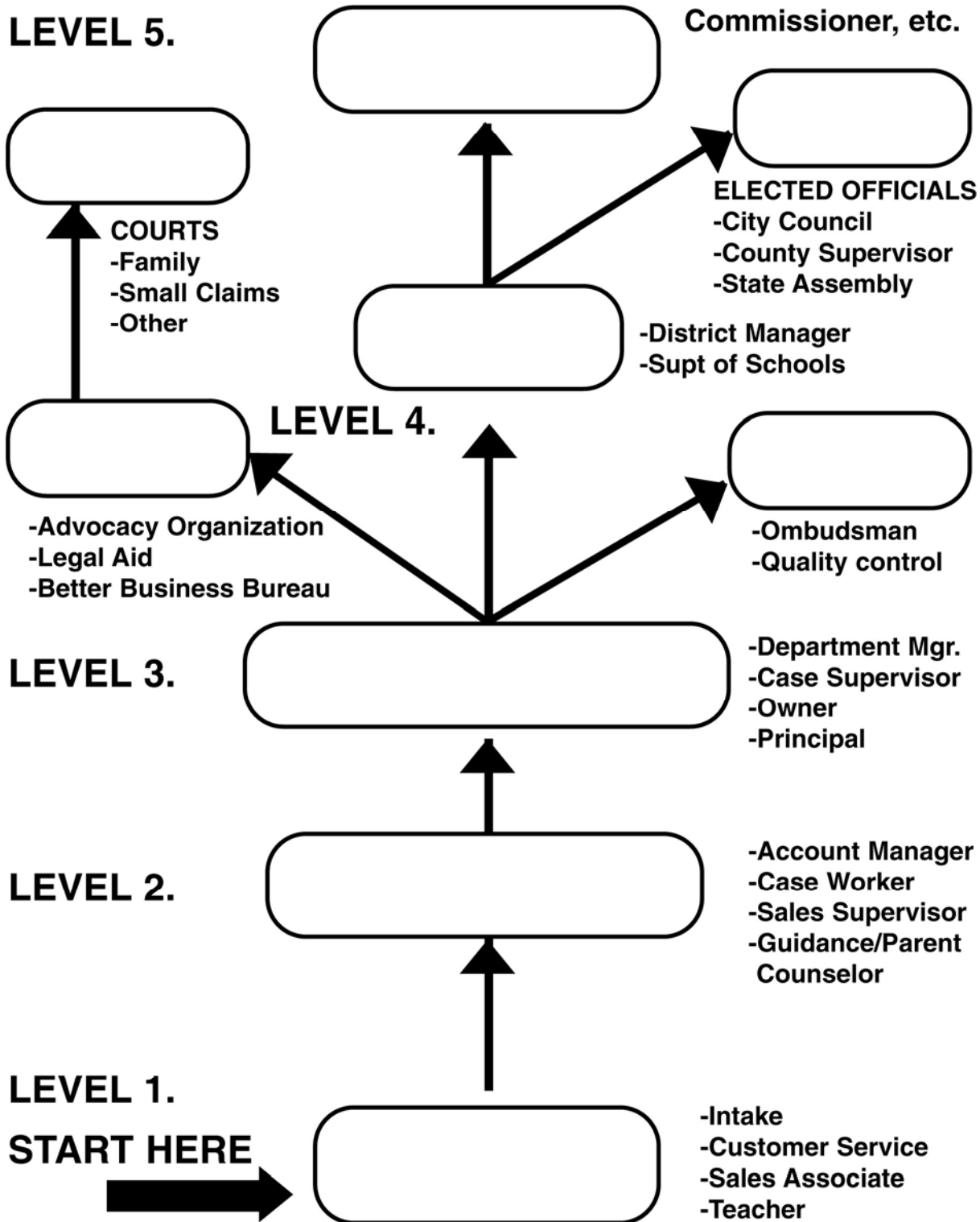
Phone Number: _____

Job Title: _____

What can he/she help with?:



SYSTEMS MAPPING



Fill in names of contacts and resource people

HOW TO NAVIGATE THE SYSTEM

Systems by definition are multilayered with overlapping areas of responsibility and many regulations. These large systems affect our quality of life because many of the services needed to achieve personal and family goals are governed by their policies. It is important to remember that there are several levels of decision making and authority in large human services systems.

- ❖ Self -advocacy and peer advocacy work usually starts at the local level and then works up through the system. Individuals can learn how to navigate their way upward in systems to achieve their advocacy goals.
 - Use research skills to learn how the systems you need to access are organized.
 - Start with the first contact person necessary to resolve an issue and present your issue. Remain polite, courteous and attentive. If your issue is not resolved at this level ask to speak to a manager or supervisor.
 - Use effective communication skills to explain, in sequence, how you have attempted to get assistance and resolve a problem. Ask for help. Follow directions provided in completing forms, submitting documents and other requests made of you.
 - Keep notes of your efforts to resolve a problem. Use your toolkit notebook to record the dates and names of persons with whom you spoke. Keep copies of all correspondence together and proof of postage. If you delivered the requested documents, get a receipt indicating who received them.
 - Follow up in a reasonable time to determine progress with your issue. If sufficient time has passed and you are not satisfied, use your systems map to contact a higher level authority within the system.
 - Seek support from your inside advocates, peers and others who may have information and experience to help you.
 - Keep going all the way to the top if necessary. Usually, when you are right about your position action will be taken before outside legal or other assistance is required.
 - Update your systems map with the contact information of everyone who is helpful to you. If someone is very helpful, send a thank you note to them and send a commendation to their manager.
 - Share your progress with peers.

The process of navigating systems takes time and patience. Take the time necessary to build relationships and learn from the process. You will be very helpful to your family and to your peers by sharing this experience and the knowledge gained.

6 STAND BY ME: ADVOCACY IN ACTION



Advocacy is the act of supporting someone in a cause. An advocate must be a good listener, speaker and observer. Advocacy also helps to understand systems and to be able to work with and support others. Successful advocacy requires understanding why, when and how to advocate in everyday life.

TOOLKIT: AN ADVOCACY STRATEGY

Before Advocating:

- Decide who is the best person to advocate for the given situation.
- Create a realistic goal; be clear about what you want to achieve.
- Have an understanding of what needs to be done to reach your goal.
- Find supportive people inside the system in which you are advocating.
- Find an advocate you can trust if the situation requires more than you can do alone.
- Determine the best methods for advocating – e.g., phone calls, letters, or face-to-face meetings.
- Actively participate in planning actions; learn from what is happening to inform future advocacy efforts.
- Determine the order of actions to be taken.

Effective Advocacy

- Begin advocacy at first awareness of a problem; work to prevent a crisis.
- Gather support for your position as soon as possible.
- Cooperate with others who are advocating for you; provide documents and other materials, as needed, as quickly as possible.
- Show up, be concerned, take responsibility and do your part.
- Create a win-win situation in which all parties feel good about the result.
- Follow-up on agreements; monitor results.
- Live up to your part of the agreement.

ADVOCACY MEETINGS: YOUR PARTICIPATION

Using the behavioral checklist that follows, think about the last advocacy meeting in which you participated. Check off the behaviors that you want to practice in role-plays.

- Remain calm and composed _____
- Stay focused on facts and issues at hand _____
- Avoid use of inflammatory language _____
- Find opportunities to agree _____
- Make agreements _____
- Take notes _____
- Plan to follow up on results _____
- Express appreciation _____

7 A TOOL KIT FOR ADVOCACY



BUILDING AN ACTUAL TOOLKIT

Plumbers, doctors, stylists, and painters all carry a toolkit. Toolkits are the resources needed to accomplish a specific job. A plumber will need a different toolkit than a painter. Families need different resources, or tools, to advocate successfully.

Assemble materials and place in separate piles. Check off each item in your pile.

TOOLKIT CHECKLIST

- ✓ Copy of birth certificate for every family member.
- ✓ Copy of driver's licenses.
- ✓ Copy of visa for every family member.
- ✓ Copy of rental/ownership contracts.
- ✓ Copy of court documents/ custody papers.
- ✓ Copy of health insurance cards.
- ✓ Copy of life insurance policy.
- ✓ Copy of car insurance cards.
- ✓ Copy of property/renter's insurance.
- ✓ Name and number of family advocates.
- ✓ Names, titles and contact information including telephone numbers for people identified in your family's systems maps (chapter 5 exercise).
- ✓ Name and number of local computer and tutoring center.
- ✓ Copy of current year's calendar (one page paper calendar) with important dates marked.
- ✓ Notebook.
- ✓ Appointment calendar.
- ✓ Pens, pencils, paper clips and hi-liter markers.

Purchase a metal file box large enough to keep these documents and materials organized. A lock may provide an added level of security, but keep two copies of the keys in separate places. Keep the box in a safe location but close enough that you will have access when needed.

- ❖ Make sure you have copies of all documents in the toolkit.
- ❖ Take precaution to prevent identity theft
- ❖ Tell one other trusted person the location of your toolkit

Highlight the headings of the documents so they are easily to tell apart. Place in packages and mark the package “Advocacy Toolkit”. Place as directed above.

Congratulations and high-fives to all who participated and understand the importance of the work completed. Talk about how it feels to have the information available and how it feels to be prepared if necessary to advocate.

8 SKILL BUILDING: THE FINE ART OF NEGOTIATION



TOOL KIT: PRACTICE SESSION FOR ADVOCACY AND NEGOTIATION

Many advocacy encounters will involve negotiations and learning how to effectively negotiate is a very useful skill. Below you will find a summary of a negotiation process outlined in the Advocacy in Action workshop. Use it to prepare for meetings in which you are advocating and want to gain/win something important. Keep this outline in your tool kit and practice often with family and friends.

NOTES FROM THE ADVOCACY WORKSHOP

Help family members and peers understand the following points about negotiation.

- Your opening position is determined by this formula:
 $\text{Time} + \text{Information (knowledge/facts)} = \text{Position}$
- State your self-interest or position.
- Make a reasonable offer.
- Give consideration to an offer made to you.
- Consider a compromise and make your counter offer a compromise.
- Reach an agreement.

Here are some typical examples where negotiation is needed:

Students negotiate with a teacher about a grade; Parents negotiate with the landlord about repairs Workers negotiate with a boss for a raise

Others: _____

ROLE-PLAY IS REHEARSAL FOR EFFECTIVE NEGOTIATION

- Role-play situations with each person following the negotiation principles above.
- Reverse role-play the situations and “play” or rehearse the opposite position.
- Discuss what felt good and right about your position and the outcome in the role- plays.
- Determine some situations where family members or peers will be expected to demonstrate “the fine art of negotiation.”



TOOLKIT: A REMINDER TO GATHER AND CELEBRATE ACHIEVEMENTS AS OFTEN AS POSSIBLE

Guidelines for Sharing Advocacy Successes:

- Welcome everyone and briefly describe the purpose of the celebration.
- Describe successful advocacy and show any materials.
- Put your tool kit on display as a model for others.
- Ask peers and family members to describe how they were supportive and what they learned.
- Talk about the highlights; funniest moments and what you learned from them.
- Encourage others to join the Powerful Families: Advocacy in Action Workshops.
- Lots of hugs and high-fives.

Enjoy your success!