

Learning From Citizen Advocacy Programs

Including a Revised Short Form of

CAPE: Citizen Advocacy Program Evaluation Standards

John O'Brien

Georgia Advocacy Office • 1447 Peachtree St. N.E. • Atlanta, Georgia 30309

This is version 1.1.

Copywrite, 1987
Georgia Advocacy Office, Inc.

Development of these materials has been supported by a grant from Chatham-Savannah Citizen Advocacy, Inc. and a gift from Jim and Linda Ryan.

The development of the 1980 test edition of CAPE was supported, in part, by the Canadian Association for the Mentally Retarded (now the Canadian Association for Community Living).

Contents

Thanks	i
Introduction	1
Key Ideas	
Citizen Advocacy	3
Citizen Advocacy is Important Because...	4
A Successful Citizen Advocacy Program...	7
Founding Principles	9
Notes on Using this Manual	14
Glossary	15

Section 1: Commitment to CA Principles: CAPE

About the Standards	1
Citizen Advocacy	3
Create & Support a Variety of Relationships	4
Develop Freely Chosen Relationships Independent of the Service System & Not Controlled by the CA Office	12
Be a model of positive interactions & interpretations	17
Define Identity & Develop Support in Community, Independent of the Human Service System	19
<u>Developments & Compromises</u>	21
<u>Agenda for Action</u>	22

Section 2: Learning from Citizen Advocacy Relationships

Interviewing People in Relationships	1
Most Important Things to Learn	2
<u>Individual Interview Notes</u>	5
<u>Individual Interview Summary</u>	7
Finding Patterns in the CA Program	11
Looking at Program Statistics	11
Questions for Discovering Patterns & Trends	12
Learning from Patterns & Trends	14

Section 3: Learning from the CA Coordinator

Preparing	1
Most Important Things to Learn	2
Summarizing	4
CA Office Effectiveness Summary	5
<u>Recruiting People with Handicaps</u>	7
<u>Recruiting Citizen Advocates</u>	8
<u>Learning About Citizen Advocacy</u>	9
<u>Bringing People Together (Matching)</u>	10
<u>Keeping in Touch with the Relationship</u>	11
<u>Supporting the Relationship</u>	12
<u>Balancing Attention Among Key Activities</u>	13

Thanks

Twenty years ago Wolf Wolfensberger saw the possibility of citizen advocacy and defined its basic principles. His passionate concern to safeguard justice and human development for people with handicaps offers a model of courageous, principled action and powerfully communicates the urgency which motivates citizen advocacy. His deep understanding of the moral significance of faithful personal relationships and his high expectations of ordinary citizens as advocates, program coordinators, and board members sets a clear standard for citizen advocacy practice. Without Wolf there would be no citizen advocacy to learn from.

Twelve years ago Patrica Powell and Betty O'Berry saw the contribution citizen advocacy could make to Georgia's communities. Their careful study of citizen advocacy and their hard work in building a foundation of financial support for it created the Georgia Advocacy Office (GAO) which they continue to guide. Their clarity of vision, willingness to confront opposition, and capacity to face difficult situations has made it possible to sustain work in Georgia communities. This work has deepened understanding of citizen advocacy principles and provided an important opportunity to learn what works and what does not in their implementation. Without Trisha and Betty citizen advocacy might still be waiting for the resources to make a faithful, long term test on more than local scale.

Many of GAO's citizen advocacy staff not only work hard to make citizen advocacy real for people but also reflect on their successes and failures and share what they have learned with others. George Durner, Tim Estes, Barbara Fisher, Diana Fricke, Linda Harrington, Tom Kohler, Frankie Lewis, Roberta Malavenda, Beth Mount, David Truran, and Pat Wilson have taught me a great deal. Without them citizen advocacy would be one more unrealized vision for Georgia's people. Joint reflection on the example of their work has been the subject of illuminating discussions with John McKnight and Ivan Illich which have broadened appreciation of the civic life of communities and sharpened understanding of the limits of professionalized services.

Citizen advocacy has grown in many places and Connie Lyle and I have been privileged to learn from citizen advocacy programs in several states and countries. Each contact has taught important lessons but the questions, conclusions and new questions arising from years of continuing work with Lynn Breedlove, Betty Ferris, and Linda Jorgenson in Wisconsin and Andy Baxter, Peter Dill and Judith Snow in Canada have been especially important.

Introduction

Learning From Citizen Advocacy Programs is for people who want to learn how to develop and run citizen advocacy (CA) programs. It defines the foundation principles of CA in a set of standards; provides a way to describe CA program performance; summarizes what some effective CA coordinators have learned to date about what works and what doesn't work in doing their jobs and provides a way to describe and assess a CA coordinator's work; identifies the strategic issues in providing a CA program with a firm foundation in community life and provides a way to describe and assess a program's strategy for doing so; and compiles some resource materials which have proven useful in practice. While it defines citizen advocacy from the point of view of people who organize CA programs, it says little about the wide variety of things people in citizen advocacy relationships actually do together.¹

The manual can be used in at least three ways: as a sourcebook for designers of external evaluations of CA programs;² as the basis of a CA program self assessment; and as a collection of resources for program board and staff. It has not been written as a book to be read but as a set of questions to consider and activities to be done. The text supports and clarifies the suggested description and evaluation activities.

Learning From Citizen Advocacy Programs has grown from the work many people have done with CAPE,² which was designed for external evaluation but used by many as a guide for program planning and self-study. The last six years of practice confirm the basic principle of CA while clarifying and deepening them. Reflection on experience has led to better understanding of how a program can work effectively.

¹ Those who want to understand citizen advocacy from the point of view of people in relationships may find some of the material in the Scrapbook section of this manual useful.

² This manual isn't sufficient in itself to guide a competent external CA program evaluation. The best way to learn is to join an evaluation team that includes people with extensive CA experience and familiarity with the sort of team work required (this type of team process is similar to that developed in PASS or PASSING evaluations). Most people who first take responsibility for a program evaluation use a more experienced consultant. Help with locating such assistance can be had from GAO.

² John O'Brien & Wolf Wolfensberger (1980). CAPE Standards for Citizen Advocacy Program Evaluation. Toronto: Canadian Association for the Mentally Retarded.

And issues of organizational structure, position, and strategy have become less clear and more important.¹

As citizen advocacy practice grows, this manual should grow and change. Your comments, arguments, clarifications, and additions are very welcome. There is an immediate need for material for the Scrapbook that reflects the many innovations developed by programs outside Georgia. Please send your contributions to:

John O'Brien
Georgia Advocacy Office
1447 Peachtree St. N.E., Suite 811
Atlanta, Georgia, 30038

A note on usage:

It is difficult to find accurate, non-stigmatizing terms. I understand the term *disability* to describe a person's inability to do some things in some environments without adaption, accommodation, or assistance. I understand the term *handicap* to describe the negative conditions imposed on a person with a disability because of social prejudice. Accordingly, this manual generally refers to *people with handicaps* because people with disabilities who are handicapped by negative treatment are the special concern of citizen advocacy.

I have also looked in vain for a suitable general term to describe the person with a handicap in a citizen advocacy relationship.

This manual talks about citizen advocacy for people with handicaps but it should not be taken to limit its application. There is no reason a citizen advocacy program could not choose to focus on other socially devalued groups --such as non-handicapped elders or non-handicapped people in conflict with the law.

¹ Those who are familiar with CAPE may be interested in the differences: CAPE consists of 36 "ratings" which summarize an evaluation team's judgements in scalar ratings, this manual uses such ratings only to assess fidelity to the basic principles of CA and deals with the issues CAPE calls CA Office Effectiveness, Community Leadership Involvement, and Funding Related Issues in a different format; this manual includes a section on describing CA program performance; and this manual includes a Scrapbook, which collects a variety of examples of materials program coordinators have found useful. These changes don't add up to a replacement for CAPE; in some instances, it may fit the users purposes better than this manual.

Key Ideas

Citizen Advocacy...

A valued citizen*

who is unpaid and independent of human services

creates a relationship with

a person who is at risk of social exclusion

and chooses one or several of many ways

to understand, respond to, and represent

that person's interests as if they were the advocate's own

thus bringing their partner's gifts and concerns

into the circles of ordinary community life.



if someone prays.

→ *not necessarily
physical
relocation.*

Of course these vital relationships occur naturally and flourish without outside support. But the widespread practice of segregating people into professionally controlled settings on the basis of prejudices about disability greatly decreases the chances of people who are not disabled knowing a person with a disability. **Citizen advocacy programs are focused on arranging and supporting relationships among people who otherwise would not meet.**

* A "valued person" is someone who is richly connected to the networks of people and associations that make up community life and willing and able to act with --and perhaps for-- another person. CA experience shows that people are rich in these valuable capacities regardless of social class, race, sex, and level of formal education.

Citizen Advocacy is important because_

- Good intentions and prejudice have combined to separate many people with handicaps into professionally controlled environments. Institutions, nursing homes, many board and care homes, and too many community residences, workshops, activity programs and special education programs segregate people --not for short periods of effective treatment but for years. Someone who is nothing but a client leads a constrained life, handicapped by being cut off from essential social and civic resources:
- **Relationships.** Friends a person can count on to do and talk about things, share joys and sorrows, and exchange personal support. A mentor who takes a personal interest helping another person discover and develop skills and talents. An assistant who chooses to help out with practical things. An ally stands with a person to help the person get what he wants. A protector stands up for a person who is vulnerable to abuse or incompetent treatment.* Someone with very few good relationships will feel lonely and be vulnerable.
- **Contacts** with networks of people who share some common interest and exchange information, access to other people, tools, favors, influence, and assistance. People enlist others to join their cause, solicit donations, get advice about the best doctor, discover new trends, locate a place to buy at a discount, borrow a router, and find job leads and business prospects from among their network of contacts. Someone without contacts is likely to be ill informed, and ineffective since she has to do things in the least efficient, most expensive way.

* Writing in straight lines creates a trap because most actual relationships can't be neatly classified. Mentors can be friends. Friends can be protectors. Assistants can be mentors. The list is just a way to suggest that there are many ways to be in a relationship. A CA program doesn't exist to choose among them but to begin and support a variety of different types of relationships.

- **Membership** in formal and informal associations -- neighborhood associations, political clubs, churches and church groups, civic organizations, softball teams, and the people who hang around together at the gas station. Being a member offers group support for one's interests, status, and the possibility of civic and political influence. Someone with no memberships is likely to be isolated and powerless and to seem a stranger to others.
- **Positive roles in the local economy.** Because of the way services are designed many people with handicaps are reduced to commodities: they are valuable because other people have jobs housing them and looking after them. Few people who rely very much on services have these everyday roles available to them: renter, home owner, worker, business person, investor, volunteer doing useful work, or student preparing for a "real job." Most Americans who rely services very much are cash and asset poor by public policy: publicly funded services are usually arranged to make people with assets ineligible, to pauperize people who enter services with assets, to discourage people from earning, and to offer people a level of cash payment well below a living wage. Someone without positive roles in the local economy is likely to have little money, limited security in housing, few opportunities to contribute, and diminished standing in negotiating conflicts because of the prejudices summed up in "beggars can't be choosers".

CA responds to people's exclusion by making and supporting personal relationships between people with very few resources and people with many resources which have their roots outside the human service system. Citizen advocates can contribute in a variety of ways: they offer the benefits of personal relationship, provide introductions to new people, help a person make contacts or use their network of contacts on the person's behalf, enlist the support of community associations, and sponsor a person's membership in community associations. They can build a variety of bridges.

- **Exclusion of people with handicaps diminishes community** in at least four ways: local people, associations, and enterprises are deprived of the energy, skills, knowledge and other gifts a person with a disability can bring; the help that a person with a disability may need can become excessively costly as the human service system implements "all or nothing" service arrangements instead of applying its resources to support the people who care for and include a person; many ordinary people don't develop or use their competencies for caring and conclude that only professionals know how; and people separate from one another to hide the human realities of imperfection, dependency, fallibility, and suffering rather than gathering together to learn their lessons. CA encourages people to welcome people with handicaps as friends, neighbors, and citizens who may need extra help or accommodation. It appeals to people's neighborliness, common sense, everyday skills, and human courage rather than to professionalized solutions. It is one way to build community competence.

- Many people with handicaps are handicapped by rejection and unfair treatment which is justified by prejudiced beliefs. Prejudices remain undisturbed as long as people remain apart. CA is one way to bring people together and dissolve prejudices.
- Many people with handicaps rely on human services that deal with them as one of a group and make few allowances for individual differences unless a person has an ally. Human services often have confusing requirements and procedures and sometimes withhold important information; an outsiders eye and voice can make an important difference. Some human services are neglectful and some abuse people; though an independent person with no special authority can seldom reform such settings he may make official systems for protecting people work better and some advocates have simply taken people away from abusive places. CA is one way to make services do better what they are able to do.
- A growing number of people believe that people with severe handicaps are at risk of a powerful, and largely hidden social process Wolf Wolfensberger has named deathmaking.⁴ Under these conditions only strong personal commitments by courageous people can hope to protect vulnerable individuals. CA is one way to form such commitments.

There are many ways to encourage caring and civic responsibility, bring people with handicaps together with other citizens, and protect and promote the interests of people with handicaps. Each way can make a real contribution; each has limitations. CA is one clear, direct approach: the formation and support of responsible personal relationships. Its worth does not depend on being the best solution for everyone or beating out other ways but on its distinctive contribution to community life.

⁴ Everyone concerned with people with handicaps should give Wolfensberger's analysis of deathmaking careful study. The Scrapbook section includes a brief statement, but the full argument is best available in a workshop presented occasionally by The Training Institute for Human Service Planning, 805 South Crouse Ave., Syracuse, N.Y. 13210.

A successful citizen advocacy program_

★ vs. thinking, talking etc.

Is animated by a **core group**,* who commit themselves to **learning through public action** how to implement citizen advocacy in their community.

This involves them in learning, over time, how to do four closely related tasks with increasing effectiveness and efficiency.

- **Achieve and maintain focus by...**
 - ...developing and deepening their own understanding and personal commitment to citizen advocacy through reflection on the situation of people with handicaps and the importance of unpaid personal relationships in many of their lives, consideration of the capacities their fellow citizens and their community associations, and study of CA principles and practice;
 - ... learning to communicate their understanding to others in a way that inspires committed action;
 - ... assessing each decision they make in terms of their shared principles;
 - ... sharing ideas and exchanging resources with core groups who are implementing CA in other places;
 - ...rigorously evaluating their program's performance --periodically with the help of an outside team experienced in CA-- celebrating successes and supporting one another to learn from shortcomings and failures.
- **Make and support a growing number and variety of citizen advocacy relationships** by insuring that the core group members who work as citizen advocacy coordinators have ...
 - ... opportunities to understand CA and to clarify its relationship to their personal values and sense of mission;
 - ... opportunities to learn how to do a coordinator's work, at least by a brief apprenticeship with an experienced coordinator;
 - ... adequate, if modest, income, benefits, and working conditions;

* The core group of committed people must include both community members and program staff. The work of a CA coordinator can't be organized and supervised in the typical pattern of agency staff relationships. It requires too much commitment to principled action. Some core group members will function as the program's board (though not every board member may be a core group member), others will work as staff, others may be key advisers. Core group members may shift among roles. The core group is defined by shared values and continuity over time.

- ... help in remembering the meaning in the routine of daily work, in failures and in successes;
 - ... practical ways to manage their time and balance their efforts among the key CA activities;
 - ... practical plans for maintaining a diversity and variety of relationships;
 - ... assistance in problem solving and practical help making the contacts necessary to learn about their community, recruit people with handicaps, and recruit citizen advocates.
 - ...assistance in supporting CA relationships.
- **Develop *community roots*** that give the program long term access to the resources it needs: people who will enter and support relationships; people who will invite others into relationships; the independence to support a variety of citizen actions, and the funds necessary to operate the program over time. This means...
 - ... sharing and increasing knowledge of the local community, especially its associational life;
 - ... defining a clear identity for the program;
 - ... taking a clear position distinct from human services by making alliances with associations involved in community regeneration;
 - ... drawing on a variety of funding sources.
- **Organize formal and informal structures** to support ongoing action. The core group needs well defined ways to...
 - ... receive and effectively manage funds;
 - ... employ staff and, if necessary, terminate employment;
 - ... make decisions consistent with CA focus;
 - ... provide mutual support and problem solving;
 - ... expand its membership in a way that increases the depth of its roots throughout the community and provide broad support for the program and the people who work as CA coordinators;
 - ... dissolve the program if it becomes impossible to implement CA.

Founding Principles

A citizen advocacy program is founded on principles which provide the test for each of the many decisions that forms the program from where to locate and how to seek funds to how coordinators manage their daily schedule. These principles define **what** a CA program is and what it is important to move toward over time. Once there is agreement about what CA is, there is room for much creativity in **how** to do it in a particular time and place.

- The focus of all of the energy available for the program is on **creating and supporting a variety of responsible personal relationships** that encourage identification with and active representation of the interests of the person with a disability, bring the person with a disability into social and community life, and usually involve long term commitments.

This means that the CA program **does not do other worthy things** that would detract from this focus:

- The CA program itself does not do individual advocacy.
- The CA program itself does not get involved with broader issues concerning people with handicaps --such as lobbying, public education or participating as an office in local service planning or governance-- though people in citizen advocacy relationships may choose to do so.
- The CA program itself does not sponsor or staff self-advocacy or family advocacy groups, though people in citizen advocacy relationships may choose to do so.

It also means that the CA program purposely seeks **diversity** among the people it invites into relationships. Over time, the program will planfully involve people from many parts of the community and reach out to people with handicaps...

- ... of different ages;
- ... of different abilities, including people with profound handicaps and people who do not apparently have the ability to respond to other people;
- ... in different living situations, including people who live on their own, people who live with their families, people who live in residential programs, and people in public and private institutions.

Over time, people will be involved in relationships that can be described in a variety of different ways. For example,

- ... some people will simply share time and activities;

- ... some people will be allies, actively working to pursue a goal of importance to the person with a handicap such as getting a job or a home or getting better service from an agency;
- ... some people will be helping the person with a handicap define and develop their gifts and interests, perhaps by sharing a skill;
- ... some people will be involved in protecting a person who is vulnerable to abuse or neglect, perhaps by monitoring a potentially dangerous situation, perhaps by speaking up for the person to responsible authorities, perhaps by arranging or providing a safe alternative;
- ... some people with handicaps will be receiving assistance with everyday or occasional decisions or tasks; and sometimes these relationships will have been formalized by an outside authority as when a person acts as a guardian of property or person, a surrogate parent, or as a payee and manager of the person's pension or benefits;
- ... some people will be offering a person with a handicap a home and a share in their family life; sometimes this will be formalized by adoption;
- ... a growing number of relationships will have lasted a long time though some will be arranged for a specific, short term purpose;
- ... there will be surprises; people in relationships will create new possibilities.

- Citizen advocates **freely choose*** to enter a relationship which is independent of the human service system and not controlled by the CA program. CA relationships are voluntary, but citizen advocates are not "volunteers" to an agency; they find direction in their relationship; not from an outside supervisor.

- Citizen advocates are **independent** of human services.

- The CA program encourages the citizen advocate to identify with the person with a handicap and look at situations from his or her point of

* As much as possible, people with handicaps should choose relationships as well. But the CA program may match citizen advocates with people who cannot choose or even with people who reject a close relationship. Some people with handicaps may be in circumstances that make it difficult to determine choice - some people cannot speak, some people have such limited experiences as to make informed consent difficult, others are in settings that exercise so much control over daily life as to make choice itself a problem, and some people's disability makes relationships difficult. The core group needs to grow in its ability to deal with the possibility of imposing a citizen advocate on an unwilling person on a situation by situation basis. When deciding this, it's important not to limit the range of possible relationships. For example, a person who might not choose to make a friend or have a mentor or an ally, might accept an assistant or a protector.

view. The program supports the citizen advocate in recognizing and acting on negative, unhelpful, or conflicting human service perspectives;

- The CA program recruits people with handicaps and supports relationships in ways that protect advocate independence;
- The CA program encourages the citizen advocate to look outside the human service system for resources and solutions. The office seeks, celebrates, and shares examples of civic or personal responsibility.

- Citizen advocates are supported by the CA program but not supervised, evaluated, or fired by the CA program.
- Citizen advocates are **not paid** or compensated in any way by or because of the program.
- The CA program itself is a **model of positive interactions and interpretations** of people with handicaps.
 - Interested people with handicaps are members of the core group and the formal board.
 - The program seeks an accurate, positive image for people with handicaps in its deliberations, literature, fund raising methods, office location, design, and decor. Stigmatizing language and images are identified and avoided.
 - Core group members strive to be respectful to the people they meet as representatives of the CA program.
- The program defines its identity and **develops its support in the community**, is able to **act independently of the human service system**, and is not identified with the human service system.
 - The program is not administered by a service providing agency;
 - The CA office is not located with or within a human service providing agency;
 - The program is funded in a way that offers the possibility of independent action and does not impose tasks, deadlines, or accountability measures that make it impossible to develop a citizen advocacy program;
 - People who work as CA coordinators do not identify themselves as or with human service workers; their alliances are with people and groups who are working to regenerate community;
 - The core group grows to include people with a variety of perspectives and connections to local people and financial resources; sometimes the only thing core group members will agree upon is the importance of citizen advocacy;

- The core group works systematically to increase the proportion of funding from sources that are not usually associated with the human services. They seek funds that will position them among the local associations that are committed to regenerating community.

Commitment to CA Principles

A Revised, Short Form of CAPE: Citizen Advocacy Program Evaluation Standards

This section of Learning From Citizen Advocacy evaluates the program's commitment to CA principles. You will answer the question "Is this a citizen advocacy program?" based on the information you have collected by discussing the program's commitments and plans with core group members, summarizing your interviews with at least a sample of people in citizen advocacy relationships [Section 2], describing office practice [Section 3], describing the program's foundation and structure [Section 4], and reading program documentation. Complete your discussion of other sections before you return to this one.

About the Standards

Each standard states a positive quality of a citizen advocacy program -- diversity of personal relationships, freely chosen relationships, independence, and being a positive model. These positive statements are further defined by a list of "nots": things a CA program will not do. Some people object to the "nots" on the grounds that it inhibits a local group's creativity. My intention is the opposite. Experience shows that some things local programs frequently think of trying undermine or confuse CA principles. Experience also shows that local programs invent a remarkable variety of different ways to make citizen advocacy real in local circumstances; especially when they avoid common pitfalls. If you know where the solution isn't, you don't have to waste time looking there.

CA programs have to learn through public action how to fully understand and implement CA principles. No program yet has come near fully implementing them but a growing number of programs are focused on systematically learning how. This section asks you to consider both intention and actions that contradict intentions to date. A program that chooses not to seek a diverse range of relationships will never learn to implement the principle. A program that makes diversity a clear goal and works toward it may do so.

Some groups carefully consider CA principles, disagree with them, and want to do something else because it fits better with their sense of mission, their understanding of people with handicaps, their experience of the local community, and their conclusions about the role and possibilities of human services. Within its limits, CA has proven a good and satisfying thing to do. But commitment to other forms of action to build community for people with handicaps is no bad thing when people are clear about the possibilities and limits of what they are doing and commit themselves to learn responsibly from their actions. Groups that disagree can use these standards to clarify

their own distinct principles.

These principles must be embraced, they cannot be imposed. I know of no examples of CA being successfully implemented when a local group was forced to conform to these principles. I know of several examples of failure, loss of energy, and bad feeling arising when groups felt pushed to do things they did not believe in. Funders who want to develop CA programs face a major organizing task to help potential local core group members understand and commit to learning the principles through disciplined action.

➡	How to Use the Standards
---	---------------------------------

- ➡ On the left hand pages in this section you will find statements of principle and a simple yes/no rating scale. On the right hand pages is a space for you to summarize key points about positive ways the program is understanding, communicating and implementing the principles; evidence of practice that contradicts the principle; and suggestions for change. This rating scale is to focus and clarify your discussion; it is not itself a measure of program quality.
- ➡ Take time for each team member to review individual and team work and fill out the short form for herself. Then discuss each principle and come to a group assessment.
- ➡ Think about "intention" and "contradiction." this way. A group with an intention to learn to do something better and better has a clear goal that members understand and invest themselves in. The goal becomes the basis for action. They identify and solve performance problems in terms of it, may search out people, skills, and information that will help move toward it and they celebrate steps toward achieving it. A group with the intention of being independent of human service provision would contradict its intention by investing staff time in attending human service system planning meetings.
- ➡ Make a big poster to keep track of the teams conclusions on each principle.
- ➡ Please be very clear, specific, and descriptive in summarizing key points. Facts about the program ("took funds to recruit advocates as volunteers to day center") are helpful; generalized expressions of concern ("major compromise of advocate independence.") are not. If you don't have specific examples, you don't have an assessment.
- ➡ When you finish the short form of CAPE, use the Action Agenda [this Section, p.20].

Citizen Advocacy_

A valued citizen^{*}
who is unpaid and independent of human services
creates a relationship with
a person who is at risk of social exclusion
and chooses one or several of many ways
to understand, respond to, and represent
that person's interests as if they were the advocate's own
thus bringing their partner's gifts and concerns
into the circles of ordinary community life.

These relationships are initiated and supported by a local association committed to implementing citizen advocacy principles. This association is independent of human service provision and focuses its energy on arranging and supporting relationships among people who otherwise would not meet because of the widespread segregation of people with handicaps.

^{*} A "valued person" is someone who knows how to get things done, is richly connected to the networks of people and associations that make up community life and willing and able to identify with, share personal resources with, and act with --and perhaps for-- another person. CA experience shows that people are rich in these valuable capacities regardless of social class, race, sex, and level of formal education.

➡ The focus of all of the energy available for the program is on **creating and supporting a variety of responsible personal relationships** that encourage identification with, and active representation of, the interests of the person with a handicap, bring the person with a handicap into social and community life, and usually involves long term commitments.

- | | | |
|-----|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Yes | No | CA program action is clearly and exclusively focused on initiating and supporting personal relationships that will bring people with handicaps into community life. |
| Yes | No | The CA office encourages citizen advocates to identify with the person with a handicap and discover what her interests, concerns and urgent needs are. <i>challenge</i> |
| Yes | No | The CA office encourages citizen advocates to be loyal to the person and act responsibly in response to their partner's interests and needs. |
| Yes | No | The CA office encourages citizen advocates to bring the person with a handicap into family, social and community life. |
| Yes | No | The CA office encourages most people to enter relationships that will last a long time. |
| Yes | No | The CA program helps keep focus and learn new ways to do its work by maintaining strong ties with others involved in citizen advocacy. |

Key Points


Positive ways in which the program is implementing, increasing understanding of, and ability to communicate this principle:

Evidence of practice that contradicts the principles:

Suggestions for improvement:

**...creating and supporting a variety
of responsible personal relationships..**

The CA program does not do other worthy things that would detract from this focus.*

Yes	No	The CA program focuses all of its energies on citizen advocacy...
		... neither the program nor office staff represent individuals with handicaps.
		... neither the program nor office staff get involved with or lobby for, monitor, educate the public about, train the workers of, or manage the human service system.
		... neither the program nor office staff sponsor, operate, or staff self-advocacy or family advocacy activities;
		... neither the program nor office staff provide case management, service brokerage, or information and referral services 
		... neither the program nor office staff devote substantial time to any other activity that distracts energy from citizen advocacy.

* When a CA program is part of a larger community association [including associations concerned with advocacy for people with disabilities such as Wolf Wolfensberger (1985) describes in Third Stage Voluntary Associations (Revised Edition), Toronto: NIMR/GAO Publications.] it needs a core group committed to CA and programmatic independence from other types of personal advocacy and social action the association undertakes. Of course, nothing in this section applies to what CA coordinators and core group members do with their personal time outside of the CA program.

Key Points

Positive ways in which the program is implementing, increasing understanding of, and ability to communicate this principle:

Evidence of practice that contradicts the principles:

Suggestions for improvement:

**...creating and supporting a variety
of responsible personal relationships...**

The program purposely seeks diversity in relationships.

Yes No The program intends* to recruit, match, and support people with disabilities of all ages.

Yes No The program intends to recruit, match and support people with different abilities, including...

... people with profound handicaps;

... people who do not apparently have the ability to respond to others;

... people who apparently find relationships very difficult and are rejecting of people who approach them;

... people with few apparent needs.

Yes No The program intends to recruit, match, and support people in different life circumstances including

... people who live on their own;

... people who live with their families;

... people who live in residential programs of all sorts;

... people who live in institutions of all kinds.

Yes No The program intends to recruit, match, and support competent, resourceful people from every segment of local community life.

* When you consider intention, don't circle "yes" on any item if current policy or practice contradicts that intention. You can circle "yes" if the program has a clear goal and is working toward it even if there are specific categories of people or relationships the CA office has not yet made. You have assessed the present situation in Section 2, "Learning From Relationships."

Key Points

Positive ways in which the program is implementing, increasing understanding of, and ability to communicate this principle:

Evidence of practice that contradicts the principles:

Suggestions for improvement:

**...creating and supporting a variety
of responsible personal relationships..**

Yes	No	The CA program intends to initiate, encourage, and support a variety of types of relationships, including relationships in which the citizen advocate could be described in such diverse ways as these:
-----	----	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

... long term friend.

...mentor.

... ally.

... protector.

... assistant.

... sponsor.

... guardian.

... mother, father.

Yes	No	The office recruits crisis advocates.
-----	----	---------------------------------------

Yes	No	There are short term matches.
-----	----	-------------------------------

Yes	No	The CA office has arranged adoptions or guardianships.
-----	----	--------------------------------------------------------

Yes	No	The CA program avoids unnecessary formalization and overprotective arrangements, for example arranging partial guardianships rather than assuming the need for full guardianship, suggesting the use of power of attorney if partial guardianship is unnecessary, etc.
-----	----	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Key Points

Positive ways in which the program is implementing, increasing understanding of, and ability to communicate this principle:

Evidence of practice that contradicts the principles:

Suggestions for improvement:

➡ Citizen advocates **freely choose** to enter a relationship which is **independent** of the human service system and not controlled by the citizen advocacy program. CA relationships are voluntary, but citizen advocates are not "volunteers" in the usual sense; they find direction in their relationship; not from an outside supervisor.

Citizen advocates are independent from the citizen advocacy office.

- | | | |
|-----|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Yes | No | <p>Citizen advocates give their time and share their personal resources without pay or compensation. No advocate receives any of these compensations from or because of the CA program ...</p> <p>...money;</p> <p>... academic credit;</p> <p>... paid time off from regular employment;</p> <p>... remission of criminal penalties;</p> <p>... help in using a CA relationship as "experience" for a paid human service position.</p> |
| Yes | No | <p>The CA program encourages citizen advocates to find direction in their relationship. Citizen advocates are supported but not supervised or evaluated by the CA program. Support may include sharing contacts, information, or ideas, but it is clear that CA coordinators follow the lead offered by the people in the relationship.</p> |
| Yes | No | <p>The CA program encourages citizen advocates to persevere, to seek new resources, and to try other ways in difficult situations. CA coordinators do not "take over" for advocates who fail, or become tired, or discouraged, or who default. CA coordinators may decide to recruit and match a second (or third, or fourth) citizen advocate for a person.</p> |
| Yes | No | <p>If, through a failure of recruitment and matching, a citizen advocate does things that give CA coordinators serious concern for the integrity or well being of the person with a handicap, people in the core group take personal responsibility for dealing with the issue --perhaps by recruiting another advocate. However the CA office assumes no authority and has no policy or intention to evaluate and fire advocates.</p> |

*control - footnote
don't hire another advocate
to replace one not doing something*

Key Points

Positive ways in which the program is implementing, increasing understanding of, and ability to communicate this principle:

Evidence of practice that contradicts the principles:

Suggestions for improvement:

_freely chosen, independent relationships _

The citizen advocate is independent of the human service system.

- | | | |
|-----|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Yes | No | If a person with a handicap relies on human service workers who communicate an unhelpful or prejudiced view of his situation or possible future, the CA program offers* the citizen advocate support to clarify things from the point of view of the person with a disability. |
| Yes | No | The CA program supports citizen advocates who choose to challenge negative human service practices. |
| Yes | No | The CA program recruits and matches people in ways that protect the independence of the relationship. |
| Yes | No | The CA program encourages people in relationships to look outside the human service system for resources and solutions. The CA program stands for, seeks out, and celebrates personal and civic responsibility. |

* Support, information, contacts and learning opportunities need not be taken up by the citizen advocate. You are looking for the CA program's ability and willingness to make the offer.

Key Points

Positive ways in which the program is implementing, increasing understanding of, and ability to communicate this principle:

Evidence of practice that contradicts the principles:

Suggestions for improvement:

⇒ The Citizen Advocacy program is a model of **positive interactions and interpretations** of people with handicaps.

Yes No Interested people with handicaps are members of the core group and the program's governing board.

Yes No Core group members are respectful of people with disabilities in personal interactions and in discussions.

Yes No Positive, accurate, non-stigmatizing language and images characterize every aspect of the CA program including...

... written documentation;

... hand outs, videos, slides, materials, and the content of speeches and discussions;

... publicity, logos, stationary, and other literature;

... the program name;

... funding sources and fund raising methods (both one's own and donor's methods);

... office location, design, and decor.

Key Points

Positive ways in which the program is implementing, increasing understanding of, and ability to communicate this principle:

Evidence of practice that contradicts the principles:

Suggestions for improvement:

➡ The CA program defines its identity and develops its support in the community. It is able to act independently of the human service system and does not identify itself with the human service system.

- | | | |
|-----|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Yes | No | The program is not administered by a human service providing agency. |
| Yes | No | The program is not located in the offices identified with human services. |
| Yes | No | Program funding protects the program's ability to act independently. Funders evaluate the performance of the CA program as a whole rather than the performance of individual advocates. Funders do not impose tasks, deadlines or accountability measures that make it impossible to implement CA principles. |
| Yes | No | CA coordinators see themselves as working outside the human service system to build community. They align themselves with others working to build community for people with handicaps and those who work locally to regenerate community. They do not identify themselves as human service workers. |
| Yes | No | The core group shows a clear pattern of growth in including more and more people from different parts of the community among those who understand and are committed to implementing CA. The CA program is growing personal links to many neighborhoods, community associations, and local networks. |
| Yes | No | The program intends to develop a broad funding base from many sources. |
| Yes | No | The program intends to have a growing proportion of its money come from sources concerned with the good of the whole community rather than human service funds. |

Key Points

Positive ways in which the program is implementing, increasing understanding of, and ability to communicate this principle:

Evidence of practice that contradicts the principles:

Suggestions for improvement:

Agenda for Action

Use this sheet to sum up the issues you feel are most critical in the CA programs development. As you review your individual and team discussions and conclusions on all of the assessment activities you have done, think about these questions:

- What should the core group's agenda be for the next year in order to build a stronger CA program five to ten years from now? What should they focus on learning through action?
- Are there any immediate threats to the CA program's integrity or survival?
- Once you have made your list, remember that no program can deal effectively with more than a very few issues. Review the list and ask the same question three ways: what are the key issues now? What will position the program best to deal with all of this? what's first? Mark the issue(s) you identify.

Learning from Citizen Advocacy Relationships

People in relationships have essential information about the performance of the CA program. By talking with a group of them you can find out about...

- ... the diversity of relationships the CA program has initiated and supports;
- ... the results of the CA coordinators work in recruiting, matching, and supporting people;
- ... people's ideas for improvements in the program.

When you have finished this stage of the assessment process your team will have summarized your impressions from individual interviews, described the pattern of relationships the program has initiated, and identified important issues for the core group's attention.

Interviewing People in Relationships

It is important to keep focus while you are interviewing people in relationships: you are evaluating the CA program, not the relationship. Your purpose is **not** to judge a particular relationship but to use what you find out from a number of people in relationships to make judgements about the CA program.

Pay attention to what you can learn about the program from each relationship. When you find yourself judging the people in the relationship or wanting to give advice, refocus your attention by asking yourself: *What is going on in the relationship that these people are in?*

Each interview will be different. Use the questions on the next page and the Individual Interview Summary (page 6) to set your goals for the interview. They are not meant to be asked as is, one after the other. You will be meeting with people who are in a variety of relationships and who may have different abilities to communicate. Study the questions carefully, then think about what works best for you as an interviewer and figure out your own strategy for finding out about the relationship. Adapt the way you ask the questions to the people you are talking with.

Make notes during the interview. Some people find they can easily use the Individual Interview Notes form (page 4-5) . If the form doesn't work for you, use a note taking method that does. Then, right after the interview, take five minutes to review your interview and complete the Individual Interview Summary. *

* Thanks to David Truran for compiling, clarifying, and inventing ways to organize ways to learn about a relationship by interviewing a citizen advocate. He has written a very helpful summary of his work with Barbara Fisher and Tom Kohler on relationship review. Available from him at GAO.

?	The most important things to learn from talking with people in relationships:
---	-------------------------------------------------------------------------------

- ? What do the people in this relationship do with and for one another?
- ? What interests and concerns brought these people together? What keeps them together? Are there any personal or practical barriers that make it hard for them to be together or to stay together (if the relationship is not planned short term)?
- ? How do the people describe one another and their relationship; for themselves, for someone who does not know the other person?
- ? What does the citizen advocate say is most important for her partner, how did she discover this, and what is she doing about it? Has the sense of what is most important changed in the course of the relationship? How?
- ? What does the person with a handicap say is most important for himself now and how does he see the citizen advocate helping?
- ? What resources (personal qualities, family, friends, contacts, memberships, material goods) has the citizen advocate brought to the person with a disability? What resources does the advocate draw on for personal support? How has the advocate increased the person's participation in community life?
- ? How has the relationship changed ...
 - ... frequency and intensity of contacts?
 - ... what seems most important in the relationship?
 - ... what have people been working on changing for the person with a disability ; what has worked, what has failed, and what has happened when there was a failure ?
- ? How has each person changed because of the relationship? Changes in life circumstances? Learning about self, about community, about possibilities for people with handicaps, about the service system?
- ? What has the CA office done in initiating and supporting the relationship that has worked well? How could the office improve?

Scheduling Note

- Get consent to be interviewed from people in relationships be sure they clearly understand that they are helping the office. They have no obligation to be interviewed. (Most people are happy to be interviewed.)
- Arrange contacts with both citizen advocates and people with disabilities. The same team member meets both people in a relationship, but it isn't necessary for both people to come together. It's OK to interview only one person in a relationship. If possible, visit some people with disabilities where they live. If possible, include visits to people who can't answer interview questions; team members will just spend a few minutes with the person.
- If there are more people in relationships than the team has time to interview select a sample of people that includes the greatest possible diversity. Include people in all types of relationships. Include relationships the coordinator feels good about, relationships the coordinator hasn't had much contact with, and relationships that give the coordinator concern.
- Arrange face to face contacts as much as possible; ask people for a 30-45 minutes. Leave at least 15 minutes between appointments to allow team members to reflect, make notes, etc. Meal times are often a good opportunity; allow at least an hour. Telephone contacts are second best; ask people for a range of time.
- Minimize travel time by having those people who can meet team members in a central place; but do not leave out face to face contacts with at least some people who can't travel easily.

+	Optional Activity
----------	--------------------------

To check team member's impressions of relationships with the coordinator's impressions, ask the coordinator to fill out the Individual Interview Summary for some of the relationships. Compare summaries and discuss the similarities and differences. The goal is not so much agreement on the first trial as it is exchange of information and perspectives.

Individual Interview Notes

Record people's own words
as much as possible

Interview with _____

who has been matched with _____ since _____

Brief description of self, the other person, the relationship:

Citizen Advocate	Relationship	Partner
<p>If you are talking to the advocate, this will be a self description. If you are talking to the person with a handicap, this will be the way she describes the advocate.</p> <p><u>Prompts:</u> Where you live. Family life. What you do for a living. Connections to community life. Special interests & concerns. Recent changes.</p>	<p>To self:</p> <p>To other people:</p> <p><i>What words would you use to describe your relationship with _____ to a friend who didn't know about CA?</i></p>	
Why is the advocate involved?	What is the bond between them?	What is most important for the person now?
<p>Of advocate: <i>Why have you decided to be involved with _____? What is important about your relationship?</i></p> <p>Of partner: <i>Why do you think _____ has chosen to be your (use the term the person chose above)?</i></p>	<p>Ask the question. Or: <i>What keeps you together?</i></p>	<p><u>Prompts:</u> Threats to safety. Lack of real home/job/school. No family life/friends. Cut off from community life. Finding interests/ learning. Inappropriate services. Need for assistance. Need for guardianship. Follow up: <i>How did you decide this?</i> <i>Have your ideas about this changed? How?</i></p>
What are the barriers to these people coming/ staying together?	What supports the relationship now?	
<p><u>Prompts:</u> Distance/travel. Service provider opposition. Family member opposition. Other obligations/interests. Problems identifying with the other person: appearance, abilities, demands, lack of common interests.</p> <p><u>Follow-up:</u> <i>What are you doing to overcome barriers?</i></p>	<p><u>Prompts:</u> Family. Other friends. (Shared) association membership. Achieving things. Mutual enjoyment. CA office.</p>	<p><u>Follow up:</u> <i>Enough support?</i> <i>Where to seek more?</i></p>

What kinds of things go on in the relationship

Prompts: (You don't have to choose just one.)

Things you do together regularly (*How often do you see ____?*)

"Big events"

Things the advocate does on her partner's behalf when they are not together.

Protection

Mentoring... sharing skills, finding interests.

Assistance ...managing money, writing letters, shopping, transport. (*Is any of this formalized in guardianship, etc.*)

Ally: helping the person get what he wants from others

Sharing time, conversation, activities.

Follow up:

Fit with what is most important for person

What resources has the advocate introduced the person to:

Prompts:

Share family life.

Find a job, a home for.

Share home/adopt.

Connect with service system.

Introduce to other friends.

Make contacts for... involve others on behalf.

Sponsor membership in association.

Follow-up: *How did you decide to?*

How did it happen?

Consider other resources in future?

How have things changed as a result of the relationship?

For the citizen advocate

For the partner

New relationships, connections, memberships

New skills /learning

Chances for contributions

New life conditions

New ideas about self/future

What the CA Office has done that's helped the relationship

How the CA office could improve.

Focus on recruitment, matching, follow up, support.

How has the relationship changed?

Prompts:

Milestones.

Increased/decreased activity.

Conflicts.

Times of rest.

Battles won and lost.

New knowledge of the other person.

Follow up:

How do you see the future of your relationship?

Individual Interview Notes

☐ Advocate

Interview with _____

who has been matched with _____ since _____

Brief description of self, the other person, the relationship:

Citizen Advocate	Relationship	Partner
	To self:	
	To other people:	

Why is the advocate involved?

What is the bond between them?

What is most important for the person now?

--	--	--

What are the barriers to these people coming/staying together?

What supports the relationship now?

--	--

What kinds of things go on in the relationship?

--

What resources has the advocate introduced the person to:

--

How have things changed as a result of the relationship?

For the citizen advocate

For the partner

--	--

What the CA Office has done that's helped the
relationship

How the CA office could improve.

--	--

How has the relationship changed?

--

Individual Interview Summary

Right after you finish your interview take a moment to go over your notes and organize your impressions. You have used the Individual Interview Notes to record the other persons answers. This form is to capture your impressions and judgements. If you are interviewing both people in the relationship at different times, do one summary sheet and begin it as soon as you finish the first interview.

Use these five point scales to describe **your impressions of the relationship** you have just heard about. Circle the number that comes closest for each item. Omit items if you have no impression. More than one thing can be true of the same relationship (it might be a strong friendship and the advocate may do a lot for the person). These scales are to focus and clarify your thinking, **not** to construct a quantitative measure of the relationships the program supports.

"1" is strong disagreement or "not at all" and "5" is strong agreement or "a very great deal".

- | | |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| 1 2 3 4 5 | A. This is a very strong friendship. |
| 1 2 3 4 5 | B. The advocate provides the person practical assistance |
| 1 2 3 4 5 | C. The advocate has accepted responsibility for protecting a person in a (potentially) dangerous situation. |
| 1 2 3 4 5 | D. The advocate is exceptionally strong, clear, and vigorous in speaking up for the person. |
| 1 2 3 4 5 | E. The advocate is acting as the person's ally; helping the person get another person or agency to assist her in pursuing an important goal. |
| 1 2 3 4 5 | F. The advocate is helping the person learn new skills or find new ways to express his unique gifts. |
| 1 2 3 4 5 | G. The relationship has been formalized by an outside authority (like a court or a government agency) specify _____. |
| 1 2 3 4 5 | H. The advocate has a very clear, distinct idea of what is in the person's best interests. |
| 1 2 3 4 5 | I. The advocate is acting very vigorously to represent or provide for the person's best interest as she understands it. |
| 1 2 3 4 5 | J. The advocate and the person with a handicap are in full agreement about the person's best interests. |
| 1 2 3 4 5 | K. The advocate has included the person in her family life. |

- 1 2 3 4 5 L. The advocate has included the person with a disability in activities with the advocate's friends.
- 1 2 3 4 5 M. The advocate has used her personal network of connections on behalf of the person.
- 1 2 3 4 5 N. The advocate has helped the person expand his own network of contacts.
- 1 2 3 4 5 O. The advocate has made the person's situation the concern of community associations of which the advocate is a member.
- 1 2 3 4 5 P. The advocate has sponsored the person's membership in community associations.
- 1 2 3 4 5 Q. The advocate has become more active in civic or political life because of the relationship.
- 1 2 3 4 5 R. Most of the advocate's energy is aimed at getting the human service system to change.
- 1 2 3 4 5 S. Most of the advocate's energy is aimed at arranging an alternative to the human service system.
- 1 2 3 4 5 T. The advocate has helped the person to get more or different human services.
- 1 2 3 4 5 U. The advocate has helped the person to get or keep a home or an occupation outside the human service system.
- 1 2 3 4 5 V. The advocate provides the person with a home or an occupation.
- 1 2 3 4 5 W. The advocate has changed a great deal because of her relationship.
- 1 2 3 4 5 X. The person with a disability has changed a great deal because of her relationship.
- 1 2 3 4 5 Y. The advocate gets as much or more from the relationship as she gives the person with a disability.
- 1 2 3 4 5 Z. This relationship will last a long time.
- 1 2 3 4 5 AA. The CA office is providing just the right support to this relationship.

1 2 3 4 5

BB. Something about this relationship worries me very much. (Please say what in the "Issues" box below).

Put a circle around the three statements that come closest to capturing your sense of the relationship as it is now.

This is what the CA program can learn from this relationship:

These are the issues this relationship raises for the CA program:

Finding Patterns in the CA Program

The purpose of collecting information from people in relationships is to inform your judgement about the most important things for the CA program to focus on learning to do better. When you find the patterns in the individual information you have now, and combine it with a look at the program's statistics you will have the information to identify:

- How well the program is doing on initiating and supporting a diversity of personal relationships. In a program committed to diversity, you will hear many different relationship stories.
- Which types of relationships the program should consider expanding and which sorts of people the program should make the connections to recruit.
- What is working and what needs improvement in the process of recruiting, matching, and supporting relationships from the point of view of people in relationships.

Looking at Program Statistics

Numbers can't capture the quality of relationships or measure the commitment of people making CA happen. They can help identify opportunities for better performance and situations that need discussion. A program that has made no matches in three months may not be in trouble, but the situation is worth the attention of the whole core group. A program that has made 15 matches in the last month also has a situation worth close discussion.

If at all possible the team should use the numbers the program already has available rather than involving the CA Coordinators in arranging their existing reports in a new way. A program that has no summary of its activity at all could benefit from generating one, using the following questions to construct a CA Program Snapshot. Wherever they come from, these are the questions you want to go over with the CA Coordinators or whoever keeps track of program activity. The whole team need not be present for this discussion as long as the team members who are construct a summary display. This display can be made with the help of the CA coordinators.

?	Patterns and Trends in Number & Variety of Relationships
---	----------------------------------------------------------

? How many relationships are active today? What is the trend in the number of relationships, at least for each of the last six months: *

- How many matches did the program make?
- How many of these were planned as short term relationships?
- How many short term relationships did the office close its files on?
- How many other relationships did the program close its files on?

How do the CA coordinators explain the current numbers and trends in relationships, matches, and file closures? What problems worth working on do they identify in the numbers and trends?

? Roughly what is the age distribution of the people who are now advocates? of the people with handicaps in relationships [Think about: infants; young children; school aged children; young adults; adults; and elders.] ? Which ages are under-represented among people with disabilities?

? Considering the citizen advocates as a group, how many parts of the local community do they represent? Who is under-represented? Is there a low representation of people by sex, race, class, ethnic group, religion, or neighborhood?

? Considering the people with handicaps as a group, how diverse a range of situations and needs do they represent?*

- What proportion of people live with their families; on their own; in community residences; in board and care; in nursing homes or other institutions?
- What proportion of people are in segregated schools or segregated day programs? What proportion of the people are not involved in any program?

* Many people find it useful to make graphs of these and other numbers. Try it.

* You are looking for patterns. Exact numbers are nice but unnecessary for this purpose. "Maybe 5 to 10" is close enough. If there are people who don't fit the categories given, their situations will be interesting to talk a little about. Precise classification isn't the point either; you are looking for types of people and relationships the office should consider recruiting to allow the broadest possible range of invitations and the broadest influence on its community.

- What proportion of people have severe disabilities? what proportion have very mild disabilities? **
 - What proportion of people apparently require relatively little from a citizen advocate? **
 - What proportion of relationships does the coordinator suppose are mostly focused on shared activities? on protection? on alliances for change? on mentoring? on providing assistance? on companionship?
 - How many people are in formal relationships, especially adoptive relationships and guardianships. **
 - How many people are unusually challenging to citizen advocates either because of the great difficulty imposed by the places they live, or because they are unable to respond obviously to others due to profound handicap or coma, or because they are very rejecting of other people?
- ? What patterns does the CA coordinator note in considering the diversity of relationships and what plans has the program developed to systematically increase diversity over time? [This issue here is one of dynamic balance. There is no one right distribution of citizen advocates and people with handicaps. There are only programs learning to stretch wider and go deeper in their local community and programs constrained by low expectations.]
-

** Wolf Wolfensberger observes that these groups of people and types of advocacy are very often neglected. See, Observations on the Development of Citizen Advocacy (1984) Toronto: NIMR/GAO Publication. Some programs debate whether to "count" a relationship after an adoption has taken place. Whatever the local practice, recall and celebrate every single adoption the CA program has ever had a hand in.

→	Learning from patterns and trends.
---	------------------------------------

- Each team member reads over the set of notes and Individual Interview Summaries he has made, and writes out the answers to these questions:^{*}
 - What patterns emerge from this set of interviews? Which relationship qualities is the program as a whole strong in? Which are less frequent? Which seem to me to be missing among the people I met?
 - What program strengths and weaknesses do I notice when I compare my summary of what I heard and saw to the basic CA principles [see Section 1].
 - What did I learn about what works and what needs improvement in the way the program recruits, matches, and supports people in relationships?
- Each team member studies the summary of the program's statistics and writes out her conclusions.
- Make a group description of patterns and trends by sharing the patterns you identified and your judgements about them. Record your points and conclusions on a big display.
- ✦ Optional activity. The team may choose to tally member's responses on to the alphabet scales on the Individual Interview Summary. The pattern that emerges might suggest some useful topics for discussion. Beware of making more of the numbers than is warranted. The main purpose of the scales is to focus attention and clarify your impressions.
- Identify any suggestions for CA program change that emerge from your discussion of what you have learned from the people you have met. Remember, your focus is on what the CA program should learn and do, not on second guessing individual advocates.

* If something you heard during the interview worried you, check it out with the CA coordinators before the team begins its discussion if it is at all possible. They need to know of your concern and you need to know how they respond.

Learning from the CA Coordinator

The CA coordinator is the program's central resource for recruiting, matching, and supporting people in relationships. In this section you will learn something about who the coordinator is, describe the way the coordinator understands and goes about his job and the supports available to him. You will judge the consistency of his pattern of work with CA principles, consider its likely effectiveness, and make suggestions for improvements.

➔	Preparing to learn from the CA coordinator.
---	---------------------------------------------

- ➔ You will gather most of the necessary information by interviewing the coordinator and filling in a set of worksheets with her. You will also review written materials and media she uses.
- ➔ The interview can take as much as three-four hours and can easily be divided in three parts as long as the same people stay involved.
- ➔ If several team members are involved in the interview, one should take the lead so the coordinator doesn't feel pushed and pulled about. If more than one person does the coordinators work, interview them separately to get a good sense of each individual style. At least two team members should interview a coordinator, summarize information, and prepare a set of the worksheets for the rest of the team.
- ➔ Your work will go best if you separate gathering information, making judgments, and making suggestions. First focus on respectfully learning how this person understands her job and exactly how she goes about it. Resist the urge to judge; there's time for that after you understand what is going on. Resist the urge to teach or share your own hints; there will be time for that during feedback.



The most important things to learn from the CA Coordinator.

Part I

- ? Learn something about the coordinator as a person by asking about where he lives, his involvements in community life, his past experiences. What personal and social resources does he have? How is he connected to the local community?
- ? Learn about what draws her to CA. How did she find her way into her work? How is being a CA coordinator important to her? What does it give her a chance to do? What rewards does she find?
- ? Learn about how he sees his job. Ask, *How do you describe what you do to interested people at parties? How do you describe your work to yourself? Do you have a metaphor or an image that captures some of the spirit of you work for you ("I'm like a ...")?*
- ? Find out how she structures time:
 - How much of the week does she typically work? What days and hours? How much variation from week to week?
 - What system does she use for keeping track of time (diary, time management system, scraps of paper and magnets)?
 - What are the broad categories she would use to divide up major activities (e.g. direct CA work, fund raising, reporting, self-renewal and education, book keeping, office clean-up, etc.) and about what percentage of her time went into each broad category in the last month? Is this typical? If not, what would a typical month be like? [You'll look later at how she divides her attention among the tasks of initiating and supporting relationships?]

Part II

? Use the set of worksheets on the following pages (or a substitute method that works better for you). Describe specifically how the coordinator understands and goes about doing the key citizen advocacy activities:

- Recruiting people with handicaps who need personal relationships.
- Recruiting citizen advocates.
- Learning about citizen advocacy.
- Bringing people together (matching)
- Keeping in touch with the relationship (follow-along).
- Supporting the relationship
 - Assisting, encouraging, and connecting.
 - Offering ongoing opportunities for learning.

? How effectively does the coordinator balance her attention among the different key activities? [For example, a coordinator who spends too much time initiating and not enough time supporting relationships may lose relationships unnecessarily.]

Part III

? Who supports the CA coordinator? Who does he turn to when he needs help with a problem? Who does he turn to with moral dilemmas? Who does he look to for encouragement? What sources and resources are available for self renewal?

? Are working conditions and pay satisfactory? What is the coordinator sacrificing for her work? How long can she see herself in the work?

? What has the coordinator learned from his work? New understandings? New skills? What works best for him in learning something new?

? What does the coordinator feel are her greatest strengths? What weaknesses make the most difference to implementing CA principles? How does she compensate for weaknesses and keep her strengths from overwhelming her?

? What plans goals and plans does the coordinator have for improving his effectiveness?

➔	Summarizing what you have learned from the CA coordinator
---	-----------------------------------------------------------

- ➔ Fill in the "Now" and "Planned Changes" boxes on each worksheet with the coordinator. Get a clear, detailed description of the way the coordinator understands and goes about each activity. He may have a variety of ways to go about an activity. Find out about each and ask how he decides which to use. Look over the CA Effectiveness Summary for some possible prompts.
 - ➔ Take time to review what you have learned and complete the CA Effectiveness Summary.
 - ➔ Consider how effectively the coordinator is implementing CA principles in her daily work. Note positive examples and contradictions of the principles in practice.
 - ➔ Consider the likely effectiveness of the coordinator's present approach. Ask yourself, if the CA office keeps on doing this activity this way what are the likely positive effects? Negative effects? Do you think planned changes are feasible? What differences will planned changes make? Record your answers in the "If no change" box.
 - ➔ Discuss your observations and conclusions with your team and come to a shared description of how effectively the key activities are carried out and balanced.
 - ➔ Review your discussion and note suggestions for change.
-

CA Office Effectiveness Summary

Use these five point scales to focus and clarify your thinking about how effectively the CA program goes about the essential work of initiating and supporting relationships. Circle the number that comes closest for each item. Omit items if you have no strong impression. These scales are **not** designed as a quantitative measure of program effectiveness; anyone performing a statistical analysis on the numbers here should be ashamed. "1" is strong disagreement or "not at all" or never and "5" is strong agreement or "a very great deal" or "all the time".

- 1 2 3 4 5 A. The coordinator has an appropriate amount of time to spend on the key CA activities.
- 1 2 3 4 5 B. The coordinator has good support to sustain her work.
- 1 2 3 4 5 C. The coordinator has good opportunities to learn what he needs to know to keep doing a better job.
- 1 2 3 4 5 D. The coordinator finds important personal meaning in her work.
- 1 2 3 4 5 E. The coordinator has good working conditions.

Recruiting a Person with a Handicap

- 1 2 3 4 5 F. The program is active and personal in its approach to recruiting people with disabilities.
- 1 2 3 4 5 G. The program sets its own agenda for recruiting people with disabilities. No outside authority says who must be recruited or pre-screens people.
- 1 2 3 4 5 H. The coordinator is searching for matches for a manageable number of people. There is not a long waiting list.
- 1 2 3 4 5 I. The coordinator visits each person with a handicap, gets to know her personally, and makes a summary profile describing the person's situation, interests, and needs.

Recruiting a Citizen Advocate

- 1 2 3 4 5 J. The coordinator identifies potential citizen advocates on the basis of the situation, interests and desires of the person with a handicap. She is recruiting a particular person on behalf of a particular person with a disability.
- 1 2 3 4 5 K. The search for a citizen advocate begins with the coordinators own personal resources. She begins by asking: Who do I know that I can approach? If no one fits, she uses her network of contacts to get the names of possible advocates.
- 1 2 3 4 5 L. The coordinator works systematically and persistently to recruit advocates. He keeps asking people.

- 1 2 3 4 5 M. The coordinator approaches possible advocates and clearly identifies the needs of the person with a disability and specifically why she is approaching him.
- 1 2 3 4 5 N. The coordinator is continuously increasing his personal network of connections to locate more people who have the resources to be citizen advocates.

Assisting People to Learn About CA

- 1 2 3 4 5 O. The coordinator offers a variety of options for learning about CA and individualizes her approach to fit the people involved.
- 1 2 3 4 5 P. The coordinator combines information and discussions specific to the particular people considering a relationship with an orientation to CA principles, options for CA action, the role of the CA office in supporting the relationship, and the social situation of people with handicaps.

Bringing People Together

- 1 2 3 4 5 Q. The coordinator talks with both parties to clarify expectations for the first meeting before and during the meeting.
- 1 2 3 4 5 R. Once both people have had the chance to get to know one another, the coordinator asks for a "yes" from both parties and clarifies the initial focus of the relationship and the responsibility both people have to each other.
- 1 2 3 4 5 S. Within two weeks of the match, the coordinator checks with the citizen advocate to find out what is happening, to reaffirm agreements and expectations, and to offer support when needed.

Keeping in touch

- 1 2 3 4 5 T. The CA office regularly contacts the citizen advocate to find out what is happening in the relationship and to offer support as needed.
- 1 2 3 4 5 U. Occasionally the CA office remembers the citizen advocate with a note, a copy of an article of interest, or a personal visit.

Supporting the Relationship

- 1 2 3 4 5 V. As requested, the CA coordinator offers assistance, information, encouragement, and contacts.
- 1 2 3 4 5 W. The CA coordinator encourages the citizen advocate to seek assistance and support among the people he knows and the associations he belongs to as well as from the advocacy office.
- 1 2 3 4 5 X. Citizen advocates have the coordinator's home phone number.
- 1 2 3 4 5 Y. The coordinator offers opportunities for people in relationships to learn more about areas of importance to them.

Recruiting people with handicaps who need citizen advocacy relationships

How the coordinator understands and goes about the activity now:

Consistency with CA principles:

If no change... /likely effect of plans...

Current problems identified by coordinator/ Planned Changes

Recruiting citizen advocates

How the coordinator understands and goes about the activity **now**:

--

Consistency with CA principles:

--

If no change— /likely effect of plans...

--

Current problems identified by coordinator/ Planned Changes

--

Learning about citizen advocacy

How the coordinator understands and goes about the activity now:

--

Consistency with CA principles:

--

If no change... /likely effect of plans...

--

Current problems identified by coordinator/ Planned Changes

--

Bringing people together (matching)

How the coordinator understands and goes about the activity now:

--

Consistency with CA principles:

--

If no change... /likely effect of plans...

--

Current problems identified by coordinator/ Planned Changes

--

Keeping in touch with the relationship

How the coordinator understands and goes about the activity **now**:

--

Consistency with CA principles:

--

If no change... /likely effect of plans...

--

Current problems identified by coordinator/ Planned Changes

--

Supporting the Relationship

Draft - 5/14/87

- **Assisting. Encouraging. Connecting**
- **Offering Opportunities for Learning**

How the coordinator understands and goes about the activity **now**:

--

Consistency with CA principles:

--

If no change_ /likely effect of plans...

--

Current problems identified by coordinator/ **Planned Changes**

--

Balancing Attention Among the Key Activities

How the coordinator understands and goes about the activity **now**:

--

Consistency with CA principles:

--

If no change— /likely effect of plans...

--

Current problems identified by coordinator/ **Planned Changes**

--

Learning About CA Program Foundations & Structure

To increase the number of citizen advocacy relationships, to maintain continuity of support for existing relationships, and to learn how to better implement CA principles, the program needs a strong foundation and an effective structure. In this section you will consider two aspects of the CA program's foundation, the core group and the position the CA program takes in the community. And you will describe and assess the program's present structure including organizational design, policies for managing work, and funding pattern.

To gather information you will: interview board members, staff, other members of the core group, program funders and perhaps CA program allies and opponents; read the program's constitution and by-laws; review board and committee minutes; read plans, annual reports, and previous evaluations; read contracts and agreements the program is party to; review budgets and expenditure reports; look at the office's systems for managing its work; and describe the formal and informal ways the program has for learning and self-renewal.

Learning About the Program's Foundations

About the Core Group

? Who is personally committed to implementing CA in this local community? Who are the people that form the heart and soul and mind of the CA program? Who is involved because CA provides them with a way to express important values in their community? Who can the program count on over time? The list of people you make as a result of this line of questions is the core group.*

* The term "core group" is made up, but it points at something alive in successful programs. There may not be "core group meetings" but the people I'm pointing to will know each other and do a lot of work together. Core group members understand CA principles and are committed to learning how to implement them. Some of them may be benefactors of the program, but not every program benefactor will know and be committed to what she is supporting. Core group members may be in citizen advocacy relationships, but not everyone in a relationship cares about the work of the CA program as a program. The core group is not an elite that controls the work of others; it's the people who do the program's work purposefully. Especially in a new program, the core group may be very small and sometimes CA coordinators are the strongest members.

- 7 Describe core group members. What do they have in common? What differences are there among them in terms of where they live, other things they care about, occupation, class, sex, race, politics?
- 7 Find out about the history of the program from the point of view of core group members. How did the program start? Who were the key actors? What brought them together? How has the program grown and changed? If you were looking for chapter titles to describe different stages of program growth, what would they be? Who has left that was important to the program? Have there been conflicts that have split the core group? Major successes and disasters? What has the program learned to do better and how did this learning come about? What problems just won't go away?
- 7 How do core group members deepen and renew their understanding and commitment?
- 7 How does the core group increase the number of people committed to the work of the CA program? How do new people find their way into committed work for CA? How do core group members develop their understanding of CA principles? How do they communicate this understanding to other people?

About the CA program's position in the community

- 7 Find out where core group members fit CA into community life. Do they see it as another human service; as a advocate focused on reforming human services; as a means of regenerating community values; as a small circle expressing values that have become very scarce and offering protection to a few people.
 - 7 Where in the community are the programs natural allies? Whether they know it yet or not, which associations or institutions in the community should support and be supported by the CA program and why?
 - 7 How does the program maintain its independence of the human service system? Make a diagram with core group members that lists "Forces pulling us into human service system control/ reducing independence" and "Forces to sustain our own base for independent action." Find out how the CA program is managing this field of forces; are they giving up independence? waiting and hoping? building their independence? How?
 - 7 Are there differences of opinion about position in the core group? With other board members? With funders, human service providers, or other people who have a stake in the program? How are these differences being managed?
-

? What do core group members see as creating opportunities for strengthening the CA program? How are they using them?

? What do core group members see as the biggest threats to the program's integrity, long term stability, and growth? What are they doing to protect the program?

CA Program Funding Worksheet

Source	% of Budget	Requirements	Impact on			
			Advocate & Program Independence	CA Program Effectiveness	Image of People with Handicaps	CA Program Position
		Consider: contracted obligations, policies imposed reporting/evaluation requirements, cost of funds, staff involved in what outside activity, evaluate individual relationships or program as a whole		Consider: recruitment, support.		Moves Pgm. more toward being part of service system or more toward community

Section 4: Learning About CA Program Foundations & Structure

Preparing	1
About the Core Group	2
About the CA Program's Position in the Community	3
<u>CA Program Independence Worksheet</u>	4
About Program Structure	5
<u>CA Program Funding Worksheet</u>	7
Conclusions About Program Foundations & Structure	8

Section 5: Scrapbook

Introduction

What is CA and why is it important for people with disabilities and our communities?

Quotations and things to read that remind us of what CA means for us.

Forms, procedures and examples of approaches to the key activities of the CA coordinator.

Examples from CA program structure.

Glossary

Citizen Advocacy Program - Refers to the formal organization the core group creates and commits to initiating and supporting personal relationships between people with disabilities and resourceful community members who would otherwise be unlikely to share their lives. The citizen advocacy program includes the **Citizen Advocacy Office**, which organizes and supports the work of **Citizen Advocacy Coordinators**, who are the core group members with primary --usually paid-- responsibility for initiating and supporting relationships. The citizen advocacy program usually --but not necessarily-- has an incorporation, a governing board, a bank account, and a formal obligation to employees.

Core Group - The informal circle of people committed to implementing citizen advocacy principles in a local community. The core group works to understand and to inspire others to understand and act on citizen advocacy principles. It is not a formal body, though a majority of board members will be a part of it. The members of an effective core group are not victims of "group think." They will disagree often about how to implement the principles they believe in. The effective core group is not closed and secretive but open to anyone who wants to make citizen advocacy real in the community. Some board members will choose to contribute their time and talents to the CA Program before they feel they understand CA principles well enough to make a commitment to them. Their honest questioning of the principles and their application in the context of the formal business of the association will keep core group members growing in their own understanding and ability to communicate. Though it is bureaucratically messy, the people who work as office staff must be core group members. There is no way to do the work of the CA office without commitment to its values. The office staff's everyday contact with many people in relationships brings an essential perspective to organizational decision making. Having a committed core group at the center of the CA program creates role confusion, conflict, and bad feelings from time to time, but without it the program will lack heart and wisdom.

Human Service System - The collection of managed, professionally controlled agencies organized to serve people who are eligible by reason of disability or some other perceived deficit along with the agencies that coordinate and raise funds for them. The human service system is mostly funded by government, sometimes with participation from charities whose aim is to assist an eligible class of people. Government may operate parts of the human service system directly, but in most communities a mix of government, voluntary non-profit, and proprietary for profit agents comprise the system. The human service system combines efforts to change eligible people, efforts to provide income supports in cash or in kind, efforts to provide personal assistance such as attendant care, and efforts to control eligible people. Users of the system very rarely

have control of the services they receive; they are seldom, for example, purchasers of the services they choose, and professionals in the system usually feel they know best. In many communities, there is a stigma attached simply to being a client of the human service system. The human service system can be helpful to people with disabilities but --unless it is exceptionally well led and carefully safeguarded-- it is likely to isolate its users from contact with ordinary people and valued community places, to fail to take adequate account of its users individuality, and even to expose its users to neglect and abuse. CA is distinct from the human service system in that it strives to initiate and support freely given relationships, it does not assess and prescribe for people, it does not assume the superiority of professional solutions over personal judgements, and it does not aspire to define and serve all of the members of an eligible class. The fact that CA maintains a distinction from the human service system is not in itself a virtue. It simply defines a place to begin work.

Learning About CA Program Foundations & Structure

To increase the number of citizen advocacy relationships, to maintain continuity of support for existing relationships, and to learn how to better implement CA principles, the program needs a strong foundation and an effective structure. In this section you will consider two aspects of the CA program's foundation, the core group and the position the CA program takes in the community. And you will describe and assess the program's present structure including organizational design, policies for managing work, and funding pattern.

➔	Learning About the Programs Foundation and Structure
---	-------------------------------------------------------------

- ➔ Review the questions, forms and program summaries in this section.
- ➔ Interview board members, staff, other members of the core group, program funders and perhaps CA program allies and opponents. Begin by identifying and talking with core group members about themselves and the way they are positioning the CA program in their community.
- ➔ Read the program's constitution and by-laws; review board and committee minutes; read plans, annual reports, and previous evaluations; read contracts and agreements the program is party to.
- ➔ Review funding arrangements, budgets and expenditure reports, and the program's practices for managing its cash. Fill out the CA Program Funding Worksheet.
- ➔ Look at the office's systems for managing its work.
- ➔ Describe the formal and informal ways the program has for insuring learning and self-renewal.
- ➔ After you have finished collecting information, take some individual time to complete the Conclusions About Program Foundations & Structure, and reflect on these questions:
 - *What are the most important issues in strengthening the core group and increasing members' understanding and commitment to CA principles?*
 - *What are the strengths and potential problems in the CA program's position in the community?*

- *What are the strengths and potential problems in the CA programs structure?*
 - *What information will help assess the program's commitment to CA principles?*
 - *What issues should be considered for the Action Agenda?*
-



Learning About the Program's Foundations

About the Core Group

- ? Who is personally committed to implementing CA in this local community? Who are the people that form the heart and soul and mind of the CA program? Who is involved because CA provides them with a way to express important values in their community? Who can the program count on over time? The list of people you make as a result of this line of questions is the core group.*
- ? Describe core group members. What do they have in common? What differences are there among them in terms of where they live, other things they care about, occupation, class, sex, race, politics?
- ? Find out about the history of the program from the point of view of core group members. How did the program start? Who were the key actors? What brought them

* The term "core group" is made up, but it identifies something alive in successful programs. There may not be "core group meetings" but the people I'm pointing to will know each other and do a lot of work together. Core group members understand CA principles and are committed to learning how to implement them. Some of them may be benefactors of the program, but not every program benefactor will know and be committed to what she is supporting. Core group members may be in citizen advocacy relationships, but not everyone in a relationship cares about the work of the CA program as a program. The core group is not an elite that controls the work of others; it is the people who do the program's work purposefully. Especially in a new program, the core group may be very small and sometimes CA coordinators are the strongest members.

together? How has the program grown and changed? If you were looking for chapter titles to describe different stages of program growth, what would they be? Who has left who was important to the program? Have there been conflicts that have split the core group? Major successes and disasters? What has the program learned to do better and how did this learning come about? What problems just won't go away?

? How do core group members deepen and renew their understanding and commitment?

? How does the core group increase the number of people committed to the work of the CA program? How do new people find their way into committed work for CA? How do core group members develop their understanding of CA principles? How do they communicate this understanding to other people?

About the CA program's position in the community

? Find out where core group members fit CA into community life. Do they see it as another human service; as an advocate focused on reforming human services; as a means of regenerating community values; as a small circle expressing values that have become very scarce and offering protection to a few people.

? Where in the community are the program's natural allies? Whether they know it yet or not, which associations or institutions in the community should support and be supported by the CA program and why?

? How does the program maintain its independence of the human service system? Fill in the CA Program Independence Worksheet [this Section, p. 3] Find out how the CA program is managing this field of forces; are they giving up independence? waiting and hoping? building their independence? How?

? Are there differences of opinion about position in the core group? With other board members? With funders, human service providers, or other people who have a stake in the program? How are these differences being managed?

? Has the CA program ever said "no" to a proposed action, alliance, or offer of funds? What were the positive and negative consequences?

? What do core group members see as creating opportunities for strengthening the CA program? How are they using them?

? What do core group members see as the biggest threats to the program's integrity, long term stability, and growth? What are they doing to protect the program?

CA Program Independence Worksheet

Use this worksheet to identify forces within and outside of the program that influence the CA program's ability to act and maintain an identity independent of the human service system. Include forces that may be small now but have the potential to grow stronger with time.

These forces move the program toward greater independence and stronger identity with the community.

These forces move the program under control of the human service system and toward identity with it.



Learning About the Program's Structure

Program structure describes the way the CA program is organized to govern itself, raise money and transact business with funders, manage its money, employ people, and keep track of information about its work. Effective solutions to the structure problem maintain program independence, support commitment, and minimize the costs of keeping the work going.

- ❓ How is the CA program structured formally?^{*} Think about how the program is chartered or incorporated if it is independent and how it relates to its parent organization if it is a part of another organization. Describe the board and committee structure and find out what people think are the strengths and weaknesses of the board and committees.
- ❓ How does the program plan? How are plans used? What have the results been?
- ❓ How does the program evaluate? How are evaluations used? What have the results been?
- ❓ How does the program raise money? What is its plan for developing funds? How does the program manage its money (think both about systems for budgeting and reporting and about management of cash flow and surpluses)? How does the program relate to its funders (fill in the CA Program Funding Worksheet [this Section, p. 1])?
- ❓ How are CA coordinators and other staff recruited, hired, prepared to work effectively, and supervised? What are the terms and conditions of employment: pay, pay scales, merit pay, benefits, hours and scheduling of work, leave and vacations, etc.? What self-renewal and ongoing educational opportunities are available to coordinators and other staff? How much turn-over has there been in the program's histo-

^{*} Most CA programs use some legally recognized organizational form. They choose to incorporate, have a board, employ people, etc. Or they affiliate with some existing organization that has such a structure. However, a core group might choose an alternative structure to do its work --such as voluntary or collective action or cooperative ownership. An alternative structure might be a strategy in the early stages of program development or it might express important values for the core group. This section is written to reflect more traditional structures because they are most common. This shouldn't be taken as discouraging other organizational forms. If the language used here doesn't fit the way people are organizing, don't try to push the program into the words. Back up and find out how the program structures itself to relate to money and getting the work done and then make judgements about the structure's strengths and weaknesses.

ry? Why have people left the program's employment? Has anyone ever been fired, and, if so, why?

? What system do CA coordinators use to manage their time and set priorities for time use? How effective do they --and others-- feel it is?

? What system and routines does the CA office use to keep track of and report required or useful information about what is happening in the program? What works well; what needs improvement?

? Does the CA office provide adequate space, furniture, equipment, and materials to support efficient work?

CA Program Funding Worksheet

Source	% of Budget	Requirements	Impact on			CA Program Position
		<p>Consider: contracted obligations, policies imposed reporting/evaluation requirements, cost of funds, staff involved in what outside activity, evaluate individual relationships or program as a whole</p>		<p>Consider: re-cruitment, support.</p>		<p>Moves Pgm. more toward being part of service system or more toward community</p>

Conclusions About Program Foundations & Structure

Use these five point scales to focus and clarify your thinking about how strong and effective the program's foundations and structures are. Circle the number that comes closest for each item. Omit items if you have no strong impression. These scales are **not** designed as a quantitative measure of program effectiveness

"1" is strong disagreement or "not at all" or "never" and "5" is strong agreement or "a very great deal" or "all the time".

About the Core Group

- 1 2 3 4 5 A. The core group has a good understanding of CA principles.
- 1 2 3 4 5 B. The core group is strongly committed to learning to implement CA principles through public action.
- 1 2 3 4 5 C. The core group uses effective ways to learn from action by figuring out what's working and what needs improvement and making changes.
- 1 2 3 4 5 D. Core group members use a variety of effective ways to renew their commitment and deepen their understanding of the situation of people with handicaps and the possibilities of community response.
- 1 2 3 4 5 E. The core group communicates its understanding of CA principles in a way that inspires others to join. Members reach out actively to include new people whose personal values will find expression through CA. The core group is not closed, limited or stagnant.
- 1 2 3 4 5 F. The core group includes the CA coordinators and a majority of the board members.
- 1 2 3 4 5 G. The program board includes people willing to share their talents with the program but not yet ready to commit themselves to CA principles.
- 1 2 3 4 5 H. The core group does a good job of dealing with conflicts among its members. The group's history shows that people can work out differences and hurt feelings.

About the CA Program's Position in the Community

- 1 2 3 4 5 I. The CA program is independent of the human service system.
- 1 2 3 4 5 J. The CA program is deeply rooted in the local community.
- 1 2 3 4 5 K. The core group agrees on and acts consistently to take a clear position for the CA program.

- 1 2 3 4 5 L. The core group defines CA primarily as a way to reform or safeguard the human service system.
- 1 2 3 4 5 M. The core group defines CA primarily as a way to build community by reaching out to initiate and support personal relationships.
- 1 2 3 4 5 N. The core group defines CA primarily as a way for a small circle of deeply committed people to offer protection to a small number of people with handicaps who are threatened by generally destructive community values.
- 1 2 3 4 5 O. In its history the CA program has said "no" to proposed actions, or alliances, or funds --perhaps even at substantial cost-- because they would compromise CA principles or move the program away from its chosen position in the community.
- 1 2 3 4 5 P. The core group has clearly identified allies who can strengthen the program among community groups and associations and is developing links with them.
- 1 2 3 4 5 Q. The core group has clearly identified threats to the program's integrity, stability, and growth and is taking planned action to protect the CA program.
- 1 2 3 4 5 R. The core group has clearly identified opportunities to strengthen the CA program and is taking planned action to make the most of them.

About the CA Program's Structure*

- 1 2 3 4 5 S. The program's formal structure clearly and effectively protects the program's independence.
- 1 2 3 4 5 T. Board composition strengthens program independence and identity with the community.
- 1 2 3 4 5 U. The board is in control of the program.
- 1 2 3 4 5 V. Board members are active.
- 1 2 3 4 5 W. Committee structures work effectively; each committee has a clear mission and makes an identifiable contribution to the CA program.
- 1 2 3 4 5 X. The program has an effective way to plan which results in useful plans that are followed and modified in practice.
- 1 2 3 4 5 Y. The program has an effective way to evaluate which results in changes in practice.
- 1 2 3 4 5 Z. The program has multiple funding sources.
- 1 2 3 4 5 AA. The program's funding strengthens its independence.
- 1 2 3 4 5 BB. The program's funding identifies it with the local community rather than with the human services.

* See the note on page 5.

- 1 2 3 4 5 CC. The program's funding plan is likely to result in greater independence as it is implemented.
- 1 2 3 4 5 DD. The funding plan is likely to result in program growth as it is implemented.
- 1 2 3 4 5 EE. The program has adequate procedures and controls to manage funds properly.
- 1 2 3 4 5 FF. The program is not wasteful in the way it spends or manages money.
- 1 2 3 4 5 GG. Staff have adequate pay, benefits, and working conditions. Effective staff do not have to leave their work for these reasons.
- 1 2 3 4 5 HH. Staff are effectively supervised.
- 1 2 3 4 5 II. CA office staff have an effective system for managing their own time and setting priorities for time use.
- 1 2 3 4 5 JJ. CA office staff and volunteers to the CA office divide up tasks in a way that makes the most possible energy available to initiating and supporting relationships.
- 1 2 3 4 5 KK. The CA office has an efficient system for reporting required information as well as information that is useful to the CA program.
- 1 2 3 4 5 LL. The CA office provides adequate space, furniture, equipment, and materials to support efficient work.

The Scrapbook

The Scrapbook collects ideas and examples from the practice of people who are working effectively to implement CA. It will grow if you send me written things that are meaningful and useful for you at the address on the cover.

The Scrapbook is organized in four sections:

- ☐ What is CA and why is it important for people with disabilities and our communities?
- ☐ Quotations and things to read that remind us of what CA means for us.
- ☐ Forms, procedures and examples of approaches to the key activities of the CA coordinator.
- ☐ Examples from CA program structure.

