

## **Do's and Don'ts of Peer Advocacy**

(Ideas for this piece originated from [How to Organize an Effective Parent/Advocacy Group and Move Bureaucracies](#). Family Resource Center on Disabilities, Chicago (© 1993).)

Peer advocacy can be a tremendously rewarding experience for the advocate and the person for and with whom they are advocating. Yet, peer advocacy also involves many pitfalls. Care and caution are required in order to make the relationship mutually beneficial. Review the lists below and write down your thoughts about how and why each of the items listed can be helpful and/or harmful – to you and the person for and with whom you are advocating.

### **As a Peer Advocate, it's okay to:**

- Help individuals help themselves;
- Build confidence so individuals are able to practice self-advocacy;
- Provide necessary tools and support to promote informed decision-making;
- Assist individuals to learn about their rights;
- Take action as requested by a person for whom you are advocating;
- Be persistent in advocating on a person's behalf;
- Assist with analyzing a problem and deciding on strategies for resolution;
- State options that might be the most effective for solving a problem;
- State your opinions as long as you are clear that you act on the other person's desires, not your own;
- Decide that the peer advocacy relationship is too stressful or unworkable for whatever reason; and
- Assist individuals to find and use resources available to them.

As a Peer Advocate, it's not okay to:

- Take over someone's life or problem and make all of the decisions for them;
- Down play or squelch someone's efforts at self-advocacy;
- Reinforce feelings of dependence and helplessness;
- Keep the person in the dark while doing everything for them;
- Make excuses for your lack of agreed to action;
- Deny the existence of a problem or complaint that the person has communicated to you;
- Speak disparagingly about the person to individuals that you are working with on a person's advocacy goal;
- Share information about the person without their consent;
- Decide for the person what they need and want as a resolution to a problem or situation; and
- Assert your own personal agenda under the guise of acting on someone else's behalf.

#### Ways to Resolve a Dispute

(Adapted from Wisconsin Coalition for Advocacy. [Where to Now?: A field guide to resolving complaints within the mental health system](#), (© 2000). Reprinted with permission.)

Described below is a summary list of ways to resolve a dispute. Although this list is generally organized in order of least aggressive to most aggressive forms of action, how you as a peer advocate and the person for or with whom you are advocating choose to approach resolving a concern or dispute is up to you. It is not necessary that you follow the order listed below.

Learn about the rights, complaint procedures and available resources applicable to the type of situation in which the person for whom you are advocating is involved. (See the Toolbox for information resources on rights and complaint procedures.) This should help you to decide

what information you need to gather and whether the facts you obtain indicate that a right has actually been violated.

## Before You Begin

The *Informal and Formal Advocacy Plan Worksheets* should be used to develop a clear plan for addressing a person's problem or situation. You should also use the *Contact List Worksheet* and the *Telephone Log Worksheet* in the Tool Kit to help you to keep organized. Remember that the activities you undertake as a peer advocate are on behalf or with someone else. Any communication, whether written or verbal, should be discussed and reviewed with the individual with whom you are advocating. Also, remember to document everything!

- Keep a file of all of your notes, any correspondence you send or receive, and all written records you may obtain. These documents should be reviewed with the person for or with whom you are advocating.
- Make written notes during all meetings and telephone calls.
- When you are meeting in person or speaking on the phone with anyone about a complaint or concern, write down the date of the communication, the name of the person and her/his position (if any), and the facts you obtain from the discussion. During the communication, it may seem easy to remember what was said, but keeping written notes at the time is very important.
- Write letters confirming and summarizing important phone calls and meetings. Always make a copy of any letter you send.

## Try to resolve the dispute informally

The majority of disputes are resolved informally. As a peer advocate, think about talking directly to the individual your peer has a dispute with. Trying to resolve issues or disputes directly and informally can often resolve the person's concern quickly, effectively, and without much time.

When discussing a concern or complaint with someone, it is useful to be prepared. Below are some suggestions that may help you when you talk with someone regarding specific concerns.

- *Decide whether you would prefer to address the issue verbally or in a letter.*

**Depending on your personality, you may feel more comfortable about addressing**

your concern in writing instead of verbally or vice versa. Use the strategy that works best for you, and talk over your decision with the peer for whom you are advocating.

- *Make an outline of what you want to say.* Often writing down what points you want to make when you meet with someone can assure that you will not forget to mention an item that is important to you. Bringing in a “cheat sheet” with your points outlined will help you to stay on track. Work with your peer to develop this “cheat sheet.”
- *Be clear about what you want to accomplish.* Before you address an issue with a provider, be prepared to answer the question, “What do I want to accomplish in this meeting? What is my desired outcome?” Your answer may range from just wanting to get the complaint off your chest, to receiving an apology. Although there is no guarantee that you will get the response you are looking for, being aware of what you want will clarify your role and the purpose of bringing it to their attention.
- *Rehearse what you want to say.* Rehearsing what you want to say will give you an edge in the meeting, particularly if you are nervous about addressing someone about the issue. Some people are more comfortable rehearsing by themselves in front of a mirror, while others prefer to have an audience. The more comfortable you are with what you want to say, the more effective you will be as a peer advocate in conveying your points.
- *Take notes during the meeting.* Make sure you write down the date of the meeting, who was present, and any agreements made during the meeting. Often summarizing what has been decided at the end of the meeting insures both parties are in agreement with the course of action if there is one.



of everything. In fact, if you aim too high you might be ignored. Start with a person who has some knowledge of you and your situation.

The person who answers the phone or is at a front desk when you call or go to an office is often there to direct you to the correct person. S/he might need to ask you some questions. This is one reason it can be helpful to have thought about the topic of your message. That person might ask, *what is this about?* That is when you express the topic you want to discuss with someone. Setting communication in motion with the right person requires from each of us a certain degree of patience and respect. (When the situation is an emergency, you do not wait patiently you contact a crisis line.)

Another part of this discussion about who you should direct your message to is how many people you should talk to about the same situation. Talk with people to increase your clarity and comfort. Talk with people you trust. Do your best to talk mostly about yourself and what you want. But, not everyone you encounter has to hear everything about your situation. When in doubt, you can say, *I want to talk about\_\_\_. Are you the right person?* If not, s/he might be able to guide you to someone else.

## **HOW CAN MY MESSAGE BE PRESENTED?**

Before you decide *how* to communicate, remember the topic and your comfort. You might be more comfortable addressing some topics in person and feel that some are better in writing or in some combination. No lengthy message should be delivered by voice mail, email, or fax. After an initial contact, if someone asks you to provide information via voice mail, email, or fax, you can decide if you want to do that.

Write anything procedural, legal, or formal that you want to request or say in a letter with a date on it. Keep a copy for yourself. Take the time to write exactly what is important. In a letter, you can avoid some of the excess emotion that you might be feeling. Also, you can ask someone you trust to review a letter to make sure that it is clear and says only what you want it to say. The Receiver will have time to consider the issue and what you want to accomplish. If you want a response, you can request a response in a reasonable amount of time.

A problem with voice mail and email is that the potential to say things that you will wish later you had not said is tremendous. A click of a mouse or an answering machine *with no reminders* that there is another person who will hear your voice or read your words is risky, especially when you have strong feelings. Another problem with voice mail and email is that

they are one sided. There is not an immediate opportunity for the Receiver to ask a question in order to better understand.

Some people prefer face to face contact. With face to face contact there are visual and other factors that will influence the Receiver's impression of you. Try to look and smell clean and neat. People notice these things and you do not want other factors to compete with your message if you can help it.

Phone contact requires the same clarity of message as face to face contact. Some people find it easier to talk on the phone because they do not have another person looking at them. Depending on the issue, you might consider phone contact.

Whether you are face to face or on the phone, listen to what the other person has to say. Ask questions. Try to understand. Asking questions and listening to the answers does not mean that you agree, it only means that you are an active participant in the interaction. Trying to understand the other person is as important as being understood.

Whether you have phone or face to face contact, you will need permission and time.

You might be thinking *why do I need permission - I can say whatever I want*. It's true that you can say what you want but that does not mean that another person has time to listen.

Permission does not always have to be formal. You can knock on someone's door and ask *do you have time to talk with me about (the topic)?* If you are told that it is not a good time, you can ask when it would be better.

Sometimes, you do not have access to knock on someone's door because a receptionist tells you that person is busy or not available. With people who work on a schedule, make an appointment. Having a time when someone agrees to meet with you means that the focus is supposed to be on you. Having an appointment does not mean the person will agree with you, only that you will have a chance to deliver your message. Communicating clearly with the right person is sometimes complicated. If you are prepared with a topic and desired outcome it might be easier for you to focus.

## **WHAT WOULD HELP ME FEEL MORE COMFORTABLE?**

Many people have learned that emotions sometimes cause them to forget their primary message. Consider having notes with you. Some people mistakenly think that notes make them appear unsure of themselves or less smart. Don't believe it. Notes demonstrate that you have put some thought into what you are saying and that you respect the person's time.

An ally is someone you trust who is willing to support you. In some situations, you can consider having an ally with you. One kind of ally is someone who is quietly by your side. Another kind of ally is an advocate (e.g., a peer or professional) who will more actively try to help you represent your message.

Some people like to deliver a difficult message without interruption. Others do not mind being asked questions. If you would prefer to explain something first without being interrupted, you can ask for that. You could say something like, *it would be helpful if I could explain first and then I can answer your questions. Would that be OK?*