

FORMAL ADVOCACY PLAN

What is the problem or issue? If there is more than one, focus on one at a time:

What is your goal?

What legal rights might be involved in this situation? Think about:

- Wisconsin Statutory rights - see Wisconsin Statutes
- Wisconsin Administrative Regulations - see Wisconsin Administrative Code
- Federal laws and /or regulations - see United States Code and /or Code of Federal Regulations
- City/County Ordinances - available at your local library
- Other (for example, agency policy or procedures): ___

What rights, if any, might have been violated in this situation?

(Write down the statute/administrative code/agency policy or procedure that you think might have been violated and a brief description of the right violated.)

If you don't know or are unsure, who might you contact to get the information about whether a legal right has been violated?

What additional facts or information might you need regarding this situation? How can you go about gathering this information?

Who are the decision-makers that you need to influence to resolve this problem/issue?

Who are some allies or potential allies in helping you resolve this problem/issue?

What are some possible solutions to the problem/issue (be specific)?

What informal advocacy strategies (for example, a letter, phone call or meeting) have you tried, if any?

If these strategies didn't work, what do you think the problem was?

What formal advocacy strategies might be available?

- Grievance procedure within the agency/program
- Complaint with a government oversight agency
- Fair hearing (for various benefit programs)

- State Courts

- Other:_____

What information about these procedures do you know? What do you need to find out?

(For example time frames, investigation process, hearings, appeals, etc.)

What other advocacy strategies might be available?

(For example, contacting your legislator or the media or forming a coalition with others)

What advocacy strategy do you think will be most effective to achieve your chosen solution to your problem?

What are the potential risks or barriers to using this strategy?

What do you plan to do? When? (Be specific)

What will you do to take care of your-self while pursuing this strategy?

What will you do if this strategy doesn't achieve the solution to your problem?

PEER ADVOCACY AND DOCUMENTATION

PEER ADVOCACY

Including aspects of documentation, communication, and roles

Understanding Your Role as a Peer Advocate

There are two distinct functions of peer advocates:

1. To work jointly and collaboratively as a knowledgeable supporter of an individual seeking resolution to a problem; or
2. To work at the request of and on someone else's behalf.

The "With" Function: Role of Knowledgeable Supporter

The primary responsibility of a peer advocating jointly and collaboratively is knowledgeable support. Your role is to assist that individual and be supportive of him/her. In this role, the peer advocate provides support and assists an individual with information regarding the advantages and disadvantages of various options to resolving the problem. Regardless of the circumstances of the situation, the ultimate decision of what to do and how to do it is made by the individual – not the peer advocate. While you need to feel comfortable with your understanding of the situation and your role in its resolution, you should not direct the individual's decisions about how that resolution should or should not be achieved. Instead, communicate together about the advantages and disadvantages of the various strategies that could be applied. Clarify the goal that the individual has identified, and work together to determine what strategies and actions might best achieve that goal. While a chosen goal or strategy might differ from what you believe is the best course of action, the individual with whom you advocate gets to choose the resolution they will try to achieve as their advocacy goal.

The “For” Function: Representational Peer Advocacy

While any form of peer advocacy involves working together, advocating on someone else’s behalf combines providing knowledgeable support with actually representing another person’s interests. When a person has a problem that demands representational peer advocacy, they might be in a state of crisis, or feel that having someone else advocate for them will be more effective. An individual might need and/or want someone to act on their behalf – to advocate for them and in consultation with them.

The key to being an advocate is having an interest in the welfare of the individual, a willingness to become knowledgeable about the situation at hand, as well as about the relevant rights and remedies, and an ability to speak out on behalf of the individual. (Advocacy Training Manual.

Wisconsin Coalition for Advocacy (1996).)

Of primary importance in being an advocate for another individual is always remembering that you are the spokesperson for that individual. If the individual has the mental capacity to express her/his own wishes, it is your responsibility to assist her/him to implement those desires whenever possible. You may not always be in total agreement with the person for whom you are advocating, but you must put aside your own opinions and represent those of the individual. You should not continue to act as an advocate for another person if you cannot separate your opinions from those of the individual. Of course, you can discuss your perceptions and ideas with the person you are helping, but the individual ultimately makes the decisions about her/his situation. When you as an advocate meet and talk with other persons regarding the individual you represent, you must present the individual’s wishes and opinions, not your own. In many situations, you will have to deal with persons who disagree with the individual’s wishes and opinions. This situation can make being an advocate challenging, especially if you also disagree with the person but have agreed to advocate for her/him. (Advocacy Training Manual. Wisconsin Coalition for Advocacy (1996).)

Peer Advocacy Blueprint for Success

Regardless of which peer advocacy function you and another person choose to employ in any given situation, there is a common guide or blueprint that should be followed for success of the relationship.

1. ***Have and utilize effective advocacy skills and strategies.*** Before undertaking any peer advocacy relationship, learn and practice the skills and strategies contained within the Informal and/or Formal Advocacy sections of this manual.

2. **Ask yourself probing questions** about your involvement in a peer advocacy relationship.

- What are *my interests and motivations* in this peer advocacy relationship?
- Do I feel comfortable undertaking this role, with this person?
- When and how are my interests and motivations the same as the person I am advocating for or with?
- When and how are they *different*?
- Am I *enabling and empowering the individual* to be her/his own advocate? (Fernandez, Happy Craven. The Child Advocacy Handbook. The Pilgrim Press, New York (© 1980).)

3. **Develop a Peer Advocacy Plan.** Deciding what your function will be as a peer advocate is just as important as talking about advocacy goals and strategies. Will you primarily serve as a supporter or a representative for the person? The peer advocate and the person requesting assistance should meet to decide on a peer advocacy plan. This plan involves jointly figuring out the “ground rules” of the peer advocacy relationship. The next section discusses strategies and steps to take to set up these ground rules.

Setting the Ground Rules

In order for a peer advocacy relationship to be mutually successful, both individuals involved need to create and then agree to a set of ground rules for how the relationship will operate. While it might feel unnecessary to clarify the issues described below at this early stage of the peer advocacy process, it is better to discuss these issues up front so that everyone is “on the same page.” Clarify answers to the following questions as specifically as possible. The more time and discussion the advocate and individual have about these issues, the less confusion and miscommunication there will be.

Once the ground rules are set, you should go through the Informal and/or Formal Advocacy Plan process that is outlined earlier in the Tool Kit. These worksheets will assist you (along with the person you are advocating for, if agreed upon) in detailing the appropriate advocacy strategy.

PEER ADVOCACY GROUND RULES WORKSHEET

Issues to Consider and Ground Rules to Set

- 1. What is the person asking you to do – function as a knowledgeable supporter or as a representative on her/his behalf? If both, under what circumstances will you function as a supporter working with the person and when will you actually act as a representative of the individual?**

- 2. What is the problem needing a peer advocacy response?**

- 3. Does the peer advocate feel clear about and comfortable with the topic?**

4. What is the goal or outcome the person would like to achieve?

5. What does the person expect the peer advocate to do? Be specific.

6. What ideas and strategies have the person and advocate mutually agreed upon?

7. In what order will these steps be taken and by what date? Who will decide when strategies should be employed?

8. What if the peer advocate chooses to no longer participate as a peer advocate?

9. What happens if there is a disagreement between the advocate and the person: on strategy, on the goal(s)?

10. If the advocate is representing the person, what process is agreed upon for informing the person of what is happening? How often should that communication take place?

11. Does the representational advocate need to check-in with the person after completing each task before starting another one?

12. Are there any decisions that the advocate should make on her/his own? If so, what if the person changes their mind after an action has been implemented?

13. Is there anything specific that the individual wants the peer advocate to keep confidential?

14. What documentation should the peer advocate keep? What is the process for providing this documentation to the person?
