

# Capricorn Citizen Advocacy

## Program Evaluation Report

May 14<sup>th</sup> – 19<sup>th</sup> 2006

*Using the*

CAPE - STANDARDS FOR CITIZEN ADVOCACY  
PROGRAM EVALUATION MANUAL

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# PART 1 AN OVERVIEW OF THE EVALUATION OF CAPRICORN CITIZEN ADVOCACY

## 1.1 Introduction

The process of evaluation is an absolute necessity if one is to obtain excellence. Some of this program's own literature and conversations with and to advocates speak of the courage necessary to do what is right. This report speaks to what we (our team) believe to be true about the Capricorn Citizen Advocacy Program; not in order to crush or hurt or to be deliberately negative. At the same time this report does not set out to whitewash reality, but to present our findings that we deeply hope that your program can and will hear. The lives of many people and we believe the future of this program depends on it. We write this report with the intention that the Capricorn Citizen Advocacy Board and Staff want to be the very best they can be in making good matches. We hope this reports contributes to that journey in a constructive and positive manner.

## 1.2 The Concept and Need for Citizen Advocacy

Citizen Advocacy was conceptualized and evolved by Dr Wolf Wolfensberger in the 1960's. Citizen Advocacy was developed for at least 3 reasons: namely, that many people with developmental disabilities:

- need assistance with the practical affairs of everyday life
- require protection and advocacy because they are held in low esteem by society, and are likely to encounter "wounding" life experiences including rejection, exploitation, abuse etc
- do not have freely given personal relationships

Though there have been various definitions of the concept of Citizen Advocacy, the most recent formulation (October 1990) by the International Citizen Advocacy Safeguards Group is probably the most clear and concise statement of the function of Citizen Advocacy:

*Citizen Advocacy is a means to promote, protect and defend the welfare and interests of, and justice for, persons who are impaired in competence, or diminished in status, or seriously physically or socially isolated, through one-to-one (or near one-to-one) unpaid voluntary commitments made to them by people of relevant competencies.*

*Citizen Advocates strive to represent the interests of a person as if they were the advocate's own; therefore, the advocates are supported, and usually recruited, by a Citizen Advocacy office with paid staff that is so funded and governed as to be essentially free from conflicts of interest.*

*In consultation with the Citizen Advocacy office, advocates choose from a wide range of functions and roles. Some of these commitments may last for life.*

### **1.3 Overview of the Capricorn Citizen Advocacy Program**

Capricorn Citizen Advocacy has held an exclusive focus on initiating and supporting freely given relationships between people with disabilities and valued citizens from their communities since August 2000. At the time of the evaluation, the program had a five member board, a full time coordinator (in the position since 2003), a part time assistant coordinator (in the position for one year) who also works as a part time administrative assistant.

Capricorn Citizen Advocacy was an independent corporation that had always received its funding from the Queensland State Government through the Disability Services Queensland. In order to receive these funds, the program has to adhere to implementing the Disability Service Standards, along with the Disability Services Act.

The program located in Rockhampton, is described as a large country town, and capital of the beef industry of Queensland. The Capricorn area is famous for its beef industry and tourism around the Yeppoon and Keppel Island areas. The current population figures are around 60,000. The majority of the community are long term residents but also a lot of new comers to the area who have relocated from other rural areas to seek employment and specialist services.

Since its inception, the program has had one previous CAPE in 2002. The 2002 CAPE particularly emphasised the importance of the program and that it had established a firm foundation for the program, the work of the staff members and advocate action.

There are now more than 34 relationships (the exact number at time of evaluation was changing as there were some matches which were in need of review) in the program, with a total of 67 relationships having been formed over the life of the program.

### **1.4 The Purpose of Evaluation**

The purpose of this evaluation is to support Capricorn Citizen Advocacy to make good matches. In that sense, this type of evaluation acts as a very effective means of safeguarding the integrity and direction of a Citizen Advocacy Program. It is recommended that any program that is serious about bringing excellence to its work adopt this CAPE Evaluation as a regular process.

It is important to emphasise that the purpose of the evaluation is not to assess the individual advocacy relationships, but to assess the program's overall capacity to arrange and support these relationships.

### **1.5 A Brief Description of the CAPE Instrument**

In evaluating the work of Capricorn Citizen Advocacy we have used the evaluation instrument, CAPE: Standards for Citizen Advocacy Program Evaluation by John O'Brien & Wolf Wolfensberger (test edition), Canadian Association for the Mentally Retarded.

CAPE is divided into 3 sections, each asking critical questions related to the identity, effectiveness and viability of a Citizen Advocacy Program:

An evaluation team sets out to answer three questions:

**(i) Is this a Citizen Advocacy Program?**

This section relates to the identity of the program, i.e: if a program significantly adheres to the Principles, then it follows that it is doing Citizen Advocacy. Conversely, if it is not, then it is not a Citizen Advocacy Program but something else.

**(ii) Is this an effective Citizen Advocacy Program?**

This section is concerned with the effectiveness and quality of the office practices - the so-called “key office activities”. Another way to put this is to ask? Is the office making good use of the Citizen Advocacy Model to make good matches?

**(iii) Will this Citizen Advocacy Program grow and thrive over the long haul?**

This section explores the programs viability over the long run - will it continue as a program, from a funding perspective and also from a governance and leadership perspective?

## **1.6 The Process of the Evaluation**

To find the answers to these three questions, the team sought information about Capricorn Citizen Advocacy from 4 distinct sources:

- 1) The Staff and Board prior to evaluation to discuss expectations, process, purpose and collect the Board’s Views of the Program's performance.
- 2) Extensively Reviewing Program Documentation:
  - Relationship files
  - Coordinator Reports
  - Previous CAPE Report
  - Staff role descriptions and duty statements
  - Publicity & promotional materials
  - Newsletters
  - Advocate orientation policies and outline
  - Program policies and procedures
  - Records of meetings
  - Internal Relationship Reviews and Recruitment Plans
  - Match history
- 3) Interviewing Office Staff for a total of 12 hours

#### 4) Other Interviews with:

- 4 of the Current Board Members
- 1 past Board Member
- 20 of the 34 Advocates in current relationships
- 10 of the 34 Protégés in current relationships
- 1 Protégés from the working list
- 2 Advocate Associates
- 1 crisis short term Advocates

All 4 sources of information were gathered and analysed (using CAPE) over 5 days and 4 nights and a total of 66 hours (i.e. 396 ‘person-hours’). The information was systematically analysed in a prescribed format referred to as ‘conciliation’, which the team conducted over the last two days of the evaluation. During conciliation the team extensively shared information and examined it against the 36 ratings of CAPE. In addition, the team extracted the main overriding issues for the program, that both comes from its rating analysis but also transcends many and sometimes all of the ratings.

On the evening of Friday the 19<sup>th</sup> May at the completion of the team’s deliberations, a *Verbal Assessment Summary* was provided to the Board and Staff that constituted a summary of the team’s findings. Those findings in an expanded written form, as well as the rating analysis (not provided verbally) now follow.

## **PART 2 STRENGTHS OF THE PROGRAM**

### **2.1 The Strengths of Capricorn Citizen Advocacy**

#### **2.1.1 Strong advocate practice....it has made a difference in people's lives**

There are many inspiring relationships in this program. There have been outstanding examples of people protecting people, saving lives, giving people back a life, embracing people, loving people. The powerful roles that advocates have played in the protégé's lives here have been outstanding, even overwhelming.

Advocates have believed in their protégé, when everyone else has abandoned them. They (the advocates) have come forward, willingly and have stayed. The team heard about and saw many of the differences in which advocates had made in the lives of their protégés. This was often exemplified by advocates saying

“He's second family now”

“He's my big brother”

“I'll always be here for him”

“I'm her constant in her life”

“We're like a big sister and brother”

“I'll always be there to stand right beside him no matter what”

“I feel really motherly towards her”

“No one messes with Henry anymore”

A lot of advocates have put it all on the line for their protégés. Doing what they said they would when first asked to come forward, and by staying in their protégés life as they said they would. The team heard and saw numerous examples of loyalty by the advocates to their protégés. Some advocates level of commitment and the demand on that advocates has again been inspiring. Advocates keep coming back day in day out. One advocate has seen their protégé every day for the past four years. Family don't even often do that!! Think about those powerful messages that these advocates are sending to the community. By their action and by their own words. They are saying “we believe that people with disability are valuable in our community”. We believe our communities need people with disability, and need to embrace them and to appreciate and receive their gifts and capacities.

These beliefs sit at the core of citizen advocacy. There is a saying “Ordinary People doing Ordinary things of extraordinary importance. This happens here in the Capricorn Citizen Advocacy program. There is no trumpet blowing, no drum banging. People just doing what needs to be done. People offering their hand in friendship, opening their hearts to love, all in order to protect and stand by their protégé. Indeed very powerful and very inspirational, and very moving.

### **2.1.1 Deep Belief and Embrace of the Citizen Advocacy Model by the Program**

The program here as a whole, including Board of Management, Staff, advocates, advocate associate and supports have embraced citizen advocacy as a model in protecting vulnerable people and making a difference in their lives. The team learnt and witnessed that this program has a real heart and commitment to the people and to the future of the program. There is a belief that Citizen Advocacy is a good thing and worth doing. There is a belief that this is about people. It is about protecting people, being there for vulnerable people.

Embracing the citizen advocacy model demonstrates that there is a belief by the program that

- a) there are people in our community who need protecting and advocacy in their lives
- b) that these people have a need for ordinary typical people to become involved and to enter relationships with people with a disability
- c) that the program will find the people. Find the most vulnerable and not just talk about doing it. The program is finding people. You are attempting to and finding people no one else wants to know about. People whose life isn't considered worthwhile. You are finding the forgotten, the hidden, the ignored. And at times this hasn't been easy or comfortable. There is not comfort zone being worked here.
- d) that people will come forward as advocates. People will respond. People are waiting to be asked. If you don't believe this, then how can you ask someone to make a commitment to a vulnerable person?
- e) that in order to become embedded in the community, one has to know the community. A lot of time and effort by the coordinators have gone into this. How can you embrace citizen advocacy in a community, if you don't know the community that needs embracing.
- f) by embedding yourselves in the community and Capricorn Citizen Advocacy is probably more embedded than you think; you also have some strong community support. People see and hear what you are doing, hence people come forward as advocates.

Not all advocacy programs fully identify and/ or believe in that.

### **2.1.3 High Level of Commitment and Passion by the Board and Staff of the Program to Citizen Advocacy and Vulnerable People**

There is a great sense of passion in this program. The saying "where there is passion there is great hope", certainly runs true to this program.

The Board of Management and staff have made enormous contributions to the development of the program over the past few years. Program staff and board have really taken the recommendations from the past CAPE to heart and made the commitment in trying to make changes and improve the quality of work in order to make many good matches.



Board and Staff are dedicated to and have made commitments to:

- a. Deepening their knowledge in order to do the work well. Hence this CAPE. This isn't always easy to do.
- b. Knowing their program and learning from it
- c. Staying around for a long time. Kerry, Ian and Lyn have been around since the early days of the program's history
- d. To the people that have been found and who are yet to be found
- e. Strong dedication of staff to do the work well (often with a sense of urgency to "get it right")
- f. Commitment by Board of Management and staff to each other to work together in achieving many good matches,
- g. There is an awareness and consciousness of what still yet has to be explored and learnt - be it a practice, or clarity of the issue at stake. There is a real willingness to learn in order to do better by the people, for the people
- h. Board of Management are hard working, whilst it is not a large board it's very clear that the board will strive to take on what is needed to be done what ever the circumstance. The core membership is very strong, highly supportive of the staff and one another. Board and staff together have committed to the development and growth of the program as a whole. This is exemplified by their growth within the citizen advocacy movement. Capricornia is part of the universal citizen advocacy movement and Capricorn Citizen Advocacy has committed to growing within that movement.
- i. The two Coordinators both have their own unique style and life experiences they bring to the program. Both have contributed enormously to the program and they also have a deep feeling for the work. They both can do the work and they are doing it well. They are both a keystone of Capricorn Citizen Advocacy. The coordinators both have a great integrity and they have worked very hard to continue the work of the program. They are careful, conscious and conscientious, which has had a huge impact upon the way in which the work is performed.

## **2.2 Issues the Program Needs to Address**

While the above current strengths are cause for affirmation and further strengthening, the program is also affected by program practices that serve to undermine its capacity to make good matches.

In order to make good matches, we believe that the Citizen Advocacy Model should be strengthened, and anything that undermines it should be dealt with quickly. We hope by laying out these opportunities for improvement in your program, you will be able to make the necessary adjustments, so that the advocacy offered to protégé's will be the most relevant and potent advocacy possible.

### **2.2.3 IDENTIFICATION OF PROTEGE NEEDS VERSUS THE IDENTIFICATION OF THE SITUATION**

It is very easy in implementing citizen advocacy within a community to find many vulnerable people. It is also easy to walk away from these people. Clearly this program doesn't walk away.

However in identifying and finding our most vulnerable within the community the program needs to have:

- a) a good clear plan
- b) clear understanding of the potential protégé's situation
- c) clear definition of the need of the person

Whilst there has been much work already achieved by the program here and there have been some creative strategies to meet people, the team found that there is confusion around a person's situation being defined as their needs. There has been excellent work around the learning about the person and the person's situation, but the actual identifying and defining of the persons needs, will need to be developed further.

The team found many examples of the needs being defined as "someone who can etc etc etc where it best would of been presented as for example:

Bill living in an unsafe environment with no supports, practically homeless (This is the situation)  
Therefore there need would be - Bill needs to have a new home with appropriate supports.

A lot of the protégés situations were very complex and could be seen as quite overwhelming. Clearly as previously stated in the strengths, that the investigation by the coordinators can become all consuming. Therefore, the issue here is coordinators spending too much time with protégés. One protégé was seen nearly every week for 4 months, whilst another was seen for nearly 7 months. This not only creates confusion all around, but the immediate needs of the protégé can be misinterpreted, from needing a home/job or creating valued roles to the person needing to go out for coffee or shopping every week - therefore only needing someone for friendship, as this is what the protégé enjoys.

The coordinators several times commented that they do not wish to intrude on a relationship or a protégés life. By staying around for such a long time is and can be intruding. You may want to reconsider the practice of spending so much time with the protégé before an advocate is recruited and introduced to the protégé. It can be easy getting to know someone in a short given time. By spending so much time learning about the person's situation or needs, can become not only a goal displacement of the KOA of protégé recruitment but also the protégé's most over riding or immediate needs get lost amongst the list of numerous others or the complexities of the protégés situation.

You need to be well disciplined with this practice. Be clear, as there is no need for the situation to be all consuming.

With the work of finding vulnerable people, the team found that with several protégés the identification of protégé needs were very general. A lot of good work has been done here, but you need to look a little bit deeper in order to slip under the skin of the person, and gain a deeper

understanding of their individual needs. Hear what the protégé is hearing, smell what the protégé is smelling, see what the protégé is seeing, really feeling it. Going where you don't want to go sometimes in order to identify the needs.

If you begin to identify the protégés needs incorrectly, then the perceived advocacy role, type of advocacy effort/demand along with a “good fit” and follow along and support will also be incorrect. Be clear about investigating or getting a snapshot of someone's needs. Investigating is a new term to citizen advocacy whereas the notion of “getting to know someone in order to complete a profile of needs and perceived advocacy roles is generally the terms used.

Further to this there is a lot of confusion around when is a potential protégé a protégé? When does the program make a commitment to the protégé? The Coordinator Reports for the last few years mention potential protégés found with wonderful descriptions of the person but then they aren't always mentioned again. Where do they go? This was tricky for the team to track a protégé.

Several questions raised by team members are as follows, and we suggest the program revisit these questions with future recruitment.

- What happens to people brought to the Board of Management?
- Who decides who is recruited into the program?
- Who decides when the person is to be recruited, and how does this process happen?
- Where does the protégé go after being investigated given that there has been often times a lengthy investigation into the person situation?
- What was the protégé thinking in terms of expectations from the program?
- When do you say no to person? How do you after the situation is so BAD.

Capricorn Citizen Advocacy cannot be a program for all. The team was interested to learn around the workings of the program since the last CAPE particularly around the issue of recruiting people under “all disability type”. There are again some people we have met that we asked “why were they recruited”. Perhaps other types of responses may have been more appropriate. There would have been others in the local community who were more devalued or vulnerable than those already matched. We again as a team strongly recommend that the program again review this issue from the previous CAPE.

With the current Recruitment Plan we suggest the program devise strategies to implement this plan. As it is, the team believes the current recruitment plan to be a reflection of the program statistics along with the projected numbers of people to be recruited for the future. There needs to be a lot more to the plan than statistics.

The program is very aware of the need to recruit children in to program, however the over reliance on human service workers is still over shadowing some potential creative work here. The team suggests the program be in contact with members of the general community, be it either cub leaders, scouts leaders, pool manager, soft play operators, MacDonald's etc

#### **2.2.4 Board of Management Growth and Leadership Development**

An area of concern to the team is the current Board composition and number of Board Members actively involved in the program. The team heard during the CAPE about often not having a quorum and it was evident that Board members were acutely aware of the need to further build the

membership of the Board. There is a real sense of urgency around this recruitment of new members, particularly given the vacant 'Secretary' role. Although the Board is small it is also an active group, but people do get sick and tired, plus people have busy lives, and the roles and responsibilities need to be shared by a broader group of people. We were concerned that with the small numbers of members there could develop an over reliance and dependence on 1 or 2 Board members to do the majority of necessary tasks that goes with being a Board Member. Also by deciding to be small in numbers, the board could be shutting doors to potential Board Members who would or could bring a diversity and strength to the program. Further to this, by remaining small, the Coordinators will continue to be involved in Board type roles that they needn't and shouldn't be.

We suggest that the Board have some discussions around the current Board composition and undertake an audit of the current Board Members to determine who are the people we have now and what type of people are needed on the current board. You may want to start by looking at the current skills of members, and review what areas do they live in, what are their connections, what are their strengths, what members have real leadership potential? Do you want or need a person who is a real mover & shaker, someone who is aboriginal or from a non English speaking background, someone with wisdom, someone young, someone with financial background, someone who is a parent of a vulnerable person, more males, someone who is very connected in the Yeppoon area and not just the Rockhampton areas, and so forth.

On completion of an audit, the Board then will need to develop strategies on how to identify potential new board members along with how to then bring them to the program. There are many good contacts in the Rockhampton area, that the team met during the week. We would suggest the Board review all the connections both past and present that the program and its members have in the area. Further discussions also need to happen around "how are we going to invite people to join the board", "who is going to", "when is it going to happen" and so forth.

In looking at the Board composition, we also suggest the Board revisit Board development and training. By having someone on the Board who can mentor new Board members and organise regular Board training and development is a vital safeguard to the program. It is a vital role of a Citizen Advocacy Board of Management to have two people on the Board who can take on the role of orientation and training new and other Board members when they come along.

Further to this, the need for Succession Planning within the Board is another area of urgency. It would be beneficial for the Board to develop a clear plan for people who would be willing and interested in developing further within the Board and taking on executive roles in the future. This would not only be an important safeguard for the Board; it also empowers the program as a whole. If a program's governance is fragile, the program then has the potential to become fragile.

With the Board taking more of a leadership role the program will only become stronger. Board members may want to have some discussion about being more connected to the people within the program. This simply could be by becoming involved in the Key Office Activities and walking along side the Coordinators on one of those activities. Be careful not to overemphasise the Privacy Act here and therefore have confidentiality/privacy as a barrier to meeting vulnerable people. By being involved in one or more of the key office activities, particularly protégé recruitment, board members will have a clearer understanding of the issues at stake in a person's life and also will be more equipped in making decisions about whether or not to recruit that protégé to the program. Further to this the board also can challenge the discussion.

When a Board isn't fully connected to the people that the program is there for, it is easy then for programs to be doing something else of a lesser degree of importance.

We would suggest that the Board may want to think about the Staff development. This could simply be sitting down with the Coordinators to talk about their work, to perhaps identify struggles with the work and then help both to plan and to look at ways of overcoming their struggles. Its not about staff appraisals, it's about identifying struggles that the staff currently have or are facing. We haven't reached a plateau yet in Citizen Advocacy where we understand it all or are "struggle free" in doing the work.

The Board has the responsibility of determining the major goals of the program. Once these goals are determined, it then becomes the Board's responsibility to discern who and what is needed to fulfil those goals. A great degree of overview, supervision and support of the Coordinators by the Board would give the Board a stronger investment in making sure that goals are met.

### **2.2.5 Competing Imagery and Practice around 'Is this a Disability Program or Advocacy Program?'**

Over the course of the evaluation the team heard several times from varying sources comments around the following:

"Is this a disability service/program or an advocacy program? "Should we be more active like a service?

As a disability program we need to be....

Being a program to service people with disabilities....

These questions and statements all led the team to believe there was quite a tension existing within the program about whether the program is viewed by the community as a disability program or an advocacy program.

Several practices within the program led us to believe that the program is being undermined by the following:

a) Service Connections

Whilst a great deal of work has been done in the past since the previous CAPE around being connected to services, there are still many connections within the program. Of course due to the history of the program, these connections may never be erased. These connections take many forms - from how protégés are being recruited; advocate associates involvement in referral and advice to staff re potential protégés; attending other services meetings; being on other services mailing lists;

b) Funding Requirements

Unfortunately due to the current funding arrangements the very requirements of the program's funding body projects the program as an adjunct to human services. The ongoing requirements for the Service Standards, the policies, the reporting mechanisms have all put the program in this light. The team is acutely aware that the Board members and staff are all highly conscious of this as well

## c) Practices

Some of the current practices around referrals are still quite clouded within the program. The team heard several occasions that protégés were referred by either advocate associates, services, families or the protégé themselves made a self referral. Whilst there is nothing wrong with the odd referral, it's the balance of, and how many referrals are made to the program. The whole notion of "referral taking" has a very human service mind set.

The team heard on numerous occasions the amount of time spent on "investigating a protégé", and the term was used over and over in many other instances. Again the notion of "investigation" conjures up images of human service procedures. In Citizen Advocacy the focus is about people and learning about a person and their life experiences and needs, not investigating the person and their situation. Service's investigate. Citizen Advocacy programs learn.

With the amount of time spent with a protégé as discussed earlier, and the involvement by the coordinators in some of the advocacy relationships, the coordinators need to reflect on whether they are doing "case management" or support. As there were numerous examples of staff involvement in advocacy practice as will be discussed later in 'Clarity of Staff Function', the team found at times some of the relationships were being "case managed". We would recommend that the coordinators reflect on how they are involved in the relationships and how that is imaged.

The team recommends that the Board of Management and Staff have a thoughtful discussion around the practices that the program is currently involved in that may project an image of human service adjunct. Further to this, the team recommends that the Board and Staff reflect about how people in the program are spoken about. On several occasions the team heard protégés being referred to as "cases", consumers, clients. All again add to the service image of people being consumers and clients.

### **2.2.6 Confusion Around Roles and Practices**

The team found that there appears to be confusion in the program, particularly around roles. This happens in a citizen advocacy program. There are often too many people, not enough people, not enough time, too much time, and at times without the dialogue, confusion can creep in and misunderstood practices begin to emerge.

The team believes there is confusions on the Board around who does what, how to do what needs to happen, and people assuming it's done. Therefore it is crucial for the board to have clear defined board roles and responsibilities for members.

The Coordinators are confused in their roles particularly around

- a) level of involvement in protégé recruitment
- b) level of involvement in relationships as they need to step back from several to enable advocacy relationship independence. Staff really need to see this as their involvement can actually be a hindrance to development of the relationship.
- c) staff doing advocacy themselves

Advocate Associates have expressed their confusion of their roles in various ways

- a) the belief that several advocate associates sense the need to refer protégés to the program
- b) that advocate associates have to be a service worker or have a professional role in order to be an advocate associate
- c) the advocate associate being an adviser and playing a support role to the staff of the program

Several advocates are confused about their advocacy role. Several stated that they

- a) need to gain permission to go further with role eg: several advocates have the ability and potential to take on a more formal role in their protégé's life. Unfortunately they feel they have to be told its okay
- b) Advocates not wanting to overstep their mark

The confusion around crisis advocacy and the role of a crisis advocate. Although this is not so much an overriding issue, the team was concerned about the practice of crisis advocacy and raised the question of when does it start and end. How long does the advocate be the crisis advocate?

The team believes that if you have a clear defined role for people within the program, the program will only further soar and develop its understanding of citizen advocacy and the universal devaluation of people.

## PART 3 CAPE RATINGS -SPECIFIC ASSESSMENT

### 3.1 Adherence to Citizen Advocacy Principles

#### **Principle One: Advocate Independence**

Description from CAPE

*In order to effectively represent protégé needs, advocates must be free to develop a primary loyalty to protégés and to act as independently as possible in meeting protégé needs. This means that: (a) advocates should see themselves as supported by, but independent of, the advocacy office itself; (b) advocates should see themselves as independent of the agencies and settings which provide services for protégés; and (c) advocates should be able to see themselves as independent from the families of protégés in those instances where family interests are different from those of individual protégés. Briefly, the Citizen Advocacy Program should be structured to support citizen advocates as unpaid, independent volunteers to an individual person. (p.1)*

- **Unpaid roles (CAPE rating R111)**

Description from CAPE

*The Citizen Advocacy relationship itself offers a wide range of intangible rewards for participants. To the extent that advocacy programs offer advocates material or other external compensation for their activities, the program compromises the advocate's capacity to freely and primarily identify with a protégés needs, and may create a barrier to independent advocate action. Further, external compensation to advocates interprets protégés as being people to whom others would only relate if they were paid, and denies individual protégés the 'world building' experience of a freely-given relationship.*

*Compensation can take a variety of forms. The most obvious and the most compromising is money. Other forms of compensation include: academic credit, paid time off from regular employment and service in expectation of a paid position. Any external compensation mechanism that raters discover should be rigorously tested against the principle that citizen advocate must be an 'unpaid' volunteer. (p.1 added emphasis)*

#### **Assessment of the team**

The team saw no evidence of relationships being influenced by the presence of payment. Capricorn Citizen Advocacy safeguarded advocate independence by ensuring that the only reason for an advocate becoming an advocate was the relationship itself, and advocates clearly held the value of personal commitment. There were no compromises of advocate independence through subtle forms of "payment", such as letter of reference, college credit, or other external rewards. The program exhibited a high level of consciousness with respect to this issue, however a caution to the program regarding meeting advocates for orientation during the advocates work time can slightly cloud the independence of the advocate. The question here would be raised around "would the advocate do this if they had to meet in the advocate's own time"?



### **Recommendation**

The program needs to review the practice of meeting with advocates at their place of work, particularly human service workers.

- **Loyalty to protégés (encompassing CAPE ratings R11211 - Internal Promotion, R11212 - External Practice, R1122 - Advocacy Practice)**

Description from CAPE

*Most protégés will be at least somewhat more dependent on human services and on their families than will others of their age. The people on whom a protégé depends will develop their own perspective on the protégé's needs. Sometimes these perspectives are so strong as to distort the protégé's own interests to conform to the needs of service providers or even families. It is essential to Citizen Advocacy that the advocate strives to define situations from the perspective of the protégé, and to act to influence situations involving the protégé in terms of the protégé's perspective. While the principle can be simply stated - the advocate voluntarily acts as an agent of an individual protégé - defining a meaningful awareness of the protégé's perspective is typically a process, which will develop through the advocate/protégé relationship. The more complex a protégé's situation, the more this necessary task will challenge the advocate. (p.2)*

### **Assessment of the Team**

The team was very encouraged to meet advocates who were very clear about their primary loyalty to protégés. In other words, the protégés always came first. Capricorn Citizen Advocacy has done excellent work in helping advocates to identify with the life situation and circumstance of protégés. Advocates clearly strived to look at the world through the eyes of protégés, and acted on that perspective. Advocates were clear about their ownership of the relationship, and Capricorn Citizen Advocacy demonstrated great skill in supporting but not intruding upon relationships (with very few exceptions). The program emphasized loyalty to protégés through a variety of means, including orientation material, policy statements, letters, protégé/advocate profiles, advocate recruitment material and ongoing follow along and training. Advocates are encouraged to get to know the protégé well, and based on that knowledge, begin to decide what issues or concerns are important from the protégé's perspective.

Advocates enacted their primary loyalty to protégés in a wide variety of ways: seeking out information about a protégé's situation, trying to figure out what the protégé really needs, getting other people involved in the person's life, telling other people about what is happening in a person's life, going to meetings, checking out work or other day program options/situation, dealing with complex service systems, letters to key people, dealing with very challenging situations and doing all of this without fanfare or external rewards. Advocates are standing by, for and with people in very powerful ways. Perhaps most compelling to the team were those instances where advocates were dealing with very, very difficult and complex situations, and found that sometimes their actions did not solve the problems necessarily, but the advocates were still holding on to hope in spite of times of despair. Many advocates verbalized their loyalty to protégés. We heard statements such as: "I'm here for him....we're good mates", "I'm just here for her, no one else". Both statements demonstrate a high commitment of loyalty to the protégé.

There were also some examples of advocates being complacent around the protégé's life needs. Feeling that as one advocate told us "it's best not to interfere" or that they felt that the complexity of the protégés situation was too hard. For example one advocate told us "I never get involved with the services or anyone". Another said of the neglect that her protégé was experiencing "I'd best just wait for the future then I might be able to do something with her life". Indeed, this loss of clarity around protégé loyalty by some advocates weakened their resolve to fight on behalf of the protégé. The advocates almost all spoke of being a friend – yet a friend would fight for someone. This lack of clarity even weakened their (potential) for friendship.

### **Recommendations**

Strengthen the orientation process with respect to advocate independence and loyalty – especially as they pertain to responding to protégé needs.

With protégés whose advocates are living with their families or in residential setting, the program may wish to discuss some strategies that could help an advocate in remaining loyal to the protégé and not getting intimidated or overwhelmed by the service or family member.

Focus advocates to protégé needs, and to acting in their best interest (advocates may need to know what is in the protégés best interests)

Continue to challenge and refocus the advocate in follow along.

Cease all activities that are done on behalf of advocates eg; regular meetings with protégés, getting information that can be easily accessed by an advocate. Let the advocate do this.

### **Principle Two: Program independence**

Description from CAPE

*In order to support the development of effective advocacy relationships, advocacy office itself must be independent. Independence implies the greatest possible freedom from conflict of interest in administration structures and funding. (p.6)*

- **CA program separation from direct service (CAPE rating R1211)**

Description from CAPE

*A Citizen Advocacy Program should share few or no aspects of governance or administration with an organisation providing clinical or case management services, which are relevant to actual or potential protégés. An advocacy office should either have a governing board, which does not govern any services, or at least it should be governed by a governance structure, which has no responsibilities for the provision of direct services to actual or potential protégés.*

*Staff members should be independent of loyalties to agencies, which would provide services to (potential) protégés. For instance, staff should not hold concurrent jobs with service-providing agencies and key staff with strong family ties to service providers should be avoided.*

*While the governing Board members should be independent of agencies that might service protégés, some (perhaps a third) of the members might come from such agencies if their presence brings important benefits and safeguards are implemented to reduce the chances that their contribution does not jeopardise the advocacy office's independence... (p.7)*

### **Assessment of the Team**

The program contains no violations of this principle and is very conscious both in its program practice, staff recruitment practices and overall Board membership of this issue. Congratulations to the program as a lot of effort has been put into trying to achieve this independence.

- **Independent CA office location (CAPE rating R1212)**

Description from CAPE

*The physical location of the advocacy office should enhance its independence. Advocacy offices should not share space with, or be in direct proximity to, direct service providers that might service (potential) protégés. (p.8)*

### **Assessment of the Team**

The office is located in a shopping complex .The office is not close to, nor does it share space with, any human services for people with disability. The location of the office doesn't present any potential future conflict of interests.

- **Independence of funding sources (CAPE rating R122)**

Description from CAPE

*The funding of CA offices - including indirect and in-kind subsidies such as donated space, equipment, supplies, secretarial services, etc. - should come from as distance a source as possible from funders who operate services which could serve (potential) protégés. As well, an advocacy office should have multiple, distinct funding to ensure that freedom of perspective and action are not compromised if one or several funders disagree with the advocacy office's actions, and thereby do remove support... (p.9)*

### **Assessment of the Team**

The programs main source of funding is from the State Department of Disability Services Queensland. While most local human services are funded from the same state sources, there is a compromise in the independence of the program from the source of funding and therefore to the human services that influence/control the lives of protégés and potential protégés.

Thus there is even theoretically some potential for the funder to adversely influence the program and the level of action of advocates because of the potential threat to the source of funds.

### **Recommendations**

Develop some strategies to develop a greater array of funding options that provides a greater degree of independence and therefore protection for the potency of advocacy.

### **Principle Three: Clarity of Staff Function**

Description from CAPE

*In order to develop the full range of its potential, an advocacy office needs a staff who understand the nature and possibilities of Citizen Advocacy and who communicate this understanding by supporting, not supplanting, advocate/protégé relationships; and by directing their energies toward building and maintaining the Citizen Advocacy Program as a whole. Clear and effective staff functions requires the distinction of a well defined staff role from the role of the citizen advocate, non competition with advocacy roles, and staff involvement with others in developing Citizen Advocacy concepts and program. (p.10)*

- **Focus of staff role definition (CAPE rating R131)**

Description from CAPE

*Advocacy office staffs are responsible for planning and implementing a Citizen Advocacy Program which would meet an increasing amount of the need of the community's handicapped people for individual Citizen Advocacy relationships. Whilst the focus of each advocate is on the individual protégé, the focus of advocacy office staff is on the advocacy program as a whole. While the perspective of each citizen advocate is on the development of the individual relationship, the perspective of the advocacy office staff is on the long-term development of the potential for a wide variety of relationships. To ensure that adequate energy is available to develop the advocacy program as a whole, staff role should be structured and supported so as to ensure that the staff does not confuse their roles with citizen advocate roles. Advocacy office staff that identify themselves with the needs of a particular protégé are unlikely to maintain the perspective necessary to the long-term needs of present and future protégés. Advocacy office staffs that see themselves as responsible for personally representing the needs of protégés as a group (as advocates for all the program's protégés) are unlikely to maintain the focus of energy necessary for program development and individual advocate recruitment and support. (p.11)*

### **Assessment of the Team**

The team found that the staff are well aware of the issue at stake but continues to make occasional and real compromises in this area. Staff roles are very clear within their given job descriptions, staff orientation guides, and the Clarity of Staff Function Policy. While to some the compromises may seem relatively trivial, the team believes that these examples do have conflicting perceptions to service personnel, families and advocates & protégés.

Such events include:

- A staff acting as an information resource to advocates (rather than perhaps pointing advocates in the direction where they (the advocates) could obtain the information)
- Staff applying for funding grant on behalf of a protégé as the advocate wasn't able to do it
- Staff visiting protégés after they are already in relationship
- Offering to organise transport etc for protégés
- Staff and advocate encouraging protégé to visit the staff at the office
- Involvement of the 3<sup>rd</sup> party role – doing follow along with both advocate/protégé could then give complicating perceptions to the protégé.
- Staff visiting a protégé for some time without finding them an advocate

(In the latter example, our question is whether the staff member has, in a de facto sense, become that persons 'advocate' – thus confusing their future role and undermining the potential advocate role further?)

### **Recommendations**

Be clear as to the role definition of a Coordinator and act on those boundaries.

Clarify and supervise the role of staff with respect to various relationships the staff are strongly connected to. Do not become a resource bureau. Support advocates to do the searching.

- **Staff independence from other advocacy forms (CAPE rating R132)**

Description from CAPE

*As a group, people with handicaps need a number of types of advocacy. For example, some will need legal assistance to establish their rights in a particular situation. Many will benefit from a variety of class advocacy efforts pursued on behalf of handicapped people as a group. Each advocacy form has its own strengths and limitations; different advocacy types need different organisational and belief structures so as to ensure their optimal delivery. Each needs to make unique demands on its staff. This rating is concerned with the differentiation of the advocacy office staff from other necessary or at least desirable advocacy forms. This does not imply that elements of a Citizen Advocacy Program might not be involved with other advocacies. Indeed, other ratings will reward Citizen Advocacy Programs, which develop advocates associates who represent special knowledge in other advocacy forms, and programs, which encourage advocates to become active in voluntary associations. Moreover, this rating applies only to advocacy office staff in their work roles, and is not intended to discourage staff from citizen activism in their non-work time. (p.12)*

### Assessment of the Team

The team observed no involvement by the program in other types of advocacy that would potentially divert it from making good matches. The staff's clarity with respect to Citizen Advocacy versus other advocacy forms is clear and uncompromised. Thus the clarity of purpose of the program and its central focus on making good matches is not weakened by any conflicting or confusing involvements in other forms of advocacy.

#### • **Ties to the Citizen Advocacy movement (CAPE rating R133)**

Description from CAPE

*CA is a helping form, which is especially demanding of staff. Though the concepts basic to Citizen Advocacy can be simply stated, their implications are complex and continue to be developed. Moreover, there are many forces acting on the typical Citizen Advocacy office, which push it toward limiting its scope, eg. over focusing on the recruitment of advocates to fill one type of advocacy role; concentrating on protégés with one particular type of need; or confusing its mission with another advocacy form. Finally, reward for CA office staff is not clear and immediate. Staff needs the back up and support of governing Board and advisory committee members who are themselves involved in increasing their identification with an understanding of the CA movement. Mechanisms for providing such mutual support include:*

- *Activities that build a sense of collective identity such as an annual picnic or other celebration shared with advocates and protégés;*
- *Membership in CA interest groups and / or associations;*
- *Participation in training activities focused specifically on Citizen Advocacy values and practice;*
- *Developing concepts and practices that contribute to the CA movement by developing position papers, disseminating useful practices, sponsoring, contributing to or presenting training events.*

*Participation in such activities can occur locally, among CA offices in a region, a state or province, or nationally/internationally...*  
(p.14)

### Assessment of the Team

The team saw a great deal of involvement by Capricorn Citizen Advocacy Program within the Citizen Advocacy Movement. The program conducts workshops and training on a local level, state level through retreats with other citizen advocacy programs, and also conducted on a national level, a national Citizen Advocacy conference. Both staff and Board have been involved in attending National Conferences. Both staff and an ex Board member have been involved in CAPE evaluations and the program has encouraged a real cross-fertilization of learning amongst programs throughout the world.

The Capricorn Citizen Advocacy program is also very involved in the developing of leadership of people who are prepared to make commitments to learning about Citizen Advocacy and doing it well. Capricorn Citizen Advocacy is a program that is held in high regard throughout the Citizen Advocacy movement.

### **Recommendation**

The team recommends that Board members give further thought to their own leadership development within the movement.

### **Principle Four: Balanced orientation to protégé needs.**

Description from CAPE

*People with handicaps have a wide variety of needs for representation and relationships that can be met by citizen advocates. One of the greatest potential strengths of Citizen Advocacy, is the flexibility to define and support those relationships, which can, if the participants choose, fit the changing individual circumstances of a protégé. However, realising this potential requires that the Citizen Advocacy office staff should be capable of developing and implementing complex, multi-path relationships. Many Citizen Advocacy offices have developed in the absence of such a multi-path strategy, and have greatly narrowed both the types of protégé need they perceive, the kinds of advocates they recruit, and the kinds of support they offer. This narrowing can easily define the pattern of growth of a Citizen Advocacy office over time such that potential flexibility becomes fixed in one or a few categories of response. Narrowing the range of possible Citizen Advocacy roles can result either in provision of overly restrictive relationships, or an inability to meet a substantial need for protection.*

*These ratings consider the Citizen Advocacy office's balance of response to protégé needs from two complementary perspectives: protégé characteristics which call for certain types of Citizen Advocacy, and the range of Citizen Advocacy role options which the Citizen Advocacy office structures. (p.15)*

#### **Protégé characteristics**

*Many individual characteristics of advocates and protégés must be considered in developing an appropriate individual match. however, review of Citizen Advocacy implementation to date has identified four dimensions of protégé need, which have the potential to be ignored or under-emphasised. These are: (a) a limited age range in protégé recruitment, thus limiting not only the range of their services but also the potential to recruit some advocates who identify more readily with an ignored age group; (b) service to people who have limited ability to reciprocate relationships; (c) people who need active spokesman ship to protect their rights; and (d) people who need relationships which will be long lasting. (p16)*

- **Protégé age (CAPE rating R1411)**

Description from CAPE

*People of all ages can potentially benefit from Citizen Advocacy relationships. Even newborns may require citizen advocates to protect them if their natural families and the human service system are uncertain as to their best interests.*

*At least eventually, if not initially, the advocacy office should plan its recruitment strategy to include people of all ages and should design its advocate recruitment process to invite citizens who are interested in representing people of all ages.(p16)*

### **Assessment of the Team**

The team analysed the age groups representing in the program from the existing relationships, the working list and the Recruitment Plan. We noted that the ages 0 – 2yrs and 3yrs – 5yrs are unrepresented, with 6 – 12yrs, 13 - 18yrs having a few represented. The major age cluster in the program is the 26 – 65yrs age range.

The team notes that the program is acutely aware of the major gaps in age sectors, but there was also a concern by team members that the program may have become a little complacent in the belief these ages particularly children under 12 years are too hard to recruit for.

### **Recommendations**

Specifically plan and make efforts to recruit protégés into each age sector, along with strategies on how to do this.

Regularly review each month how the program is working towards recruiting protégés in age sectors not represented.

Encourage Board members to be actively involved in this review or discussion.

Speak with Programs who have been successful in identifying and recruiting younger children.

- **Protégés capacity for relationship reciprocity (CAPE rating R1412)**

Description from CAPE

*A number of people who need the protection and representation offered by Citizen Advocacy are limited in their ability to respond to others, including citizen advocates. Non-responsiveness may be a general characteristic of the person - as when a person is profoundly handicapped - or it may primarily characterise the person's strong negative or abusive response to people who are seen as trying to 'help' or control. One of the major challenges facing Citizen Advocacy offices lies in recruiting and supporting advocates to fill a variety of roles for people who do not reciprocate. (p17)*



### Assessment of the Team

The team found that there were 11 protégés (of 34) in the program who from a normative sense would be regarded as non-reciprocal. This information was gathered from interviewing protégés and reviewing the Internal Relationship Review that Board and Staff have conducted. This represents greater than 20% of the program and is a commendable level of representation. The team learnt from reviewing the various documentation that there were questions and confusion around whether or not the person would be seen as “non reciprocal”. The program then may wish to review what it understands “non reciprocal” to be.

### Recommendations

Have a clear discussion around what does it mean for someone to be deemed “non reciprocal”

- **Protégés need for spokespersonship to defend human and legal rights (CAPE rating R1413)**

Description from CAPE

*A number of handicapped people will, at some point in their lives, need another person to vigorously represent their interests in a situation in which their rights are (or are at risk of) being compromised. A person's need for such spokespersonship can be effectively - even inspiringly - met by a citizen advocate, either on the basis of an ad hoc, short-term relationship, or in the context of a long term relationship. Since spokespersonship needs usually come and go in a person's life, this rating is based on evidence of a history of vigorous spokespersonship by a variety of citizen advocates.*

### Assessment of the Team

There is a great awareness of the need for spokespersonship for protégés. Of the 20 relationships met by the team, in 18 of the relationships there had been vigorous, strong or low levels of spokespersonship, plus 2 had not yet incurred any spokespersonship. The programs' own review of relationships claimed 34 relationships with spokespersonship compared to 5 without. Either way, this is a gratifying level of spokespersonship in the program.

People's lives have been changed by the active and vigorous spokespersonship by advocates for and on behalf of their protégés. We believe lives have been saved due to this. A good example of this is with the relationship with Henry and Tom. We believe that if Tom hadn't done what he did, Henry probably wouldn't be alive today.

The team heard on many occasions comments from advocates such as “we're family now...I'll make sure nothing happens to him”. “I don't have a problem speaking up for him. Who will if I don't”? “That's what advocates do. They speak up for their loved one” These relationships were very inspirational for the team members.

Absolutely a humbling experience for all team members to have witnessed and learnt from. Congratulations, the program has achieved wonderful results here.

### **Recommendations**

The team suggests the program look at ways to define spokemanship to advocates as not all advocates understand what this really is.

The program may wish to consider the notion of supporting advocates to keep the fire in the belly so to speak.

The program may wish to consider identifying ways to support advocates to challenge the status quo.

The program may wish to look at ways to support advocates that have or may become complacent in their advocacy role. Not all advocates will speak out, therefore the issue of complacency can creep in.

- **Protégés need for long term relationships (CAPE rating R1414)**

Description from CAPE

*A substantial number of people with handicaps need a relationship which will endure over a long time - perhaps even throughout a person's life. Many of them will have experienced what has been called a 'relationship circus' in which 'helping' person after 'helping' person has come into their lives and then, as quickly, left. The advocacy office should recognise and seek response to this need.*

### **Assessment of the Team**

The program has a wonderful result of being able to repeatedly create matches that become long term or life long. Of the 20 relationships the team met, we considered 14 to be long term, and 3 relationship were thought to be life long. There is a deep awareness by the program for the need for people to have advocates remain in their lives for a long time. Also advocates themselves were very conscious about being in their protégé's life for a long time. This was clearly stated several times. The program also refers to "short term matches", although the program at time of the evaluation had no advocates in any "short term relationship. There were only 2 relationships that the team were unsure about the longevity of the relationship.

### **Recommendations**

Review the relationships that the program feels are now not active and decide what will need to happen for the protégés in these relationships.

Review the definition of the term used in the program "short term, or medium term" relationships.

- **Diversity of advocacy roles (encompassing CAPE ratings R1421 and R1422)**

Description from CAPE

*The range of Citizen Advocacy roles which an advocacy office staff conceptualise and plan for as they recruit, match, and support advocates is perhaps the single most powerful determinant of an offices' long term success. This does not suggest that citizen advocates themselves are, or should be, bound to any sort of a 'job description.' Citizen advocates choose the investment they wish to make, and choose, together with the protégé, the direction and content of their relationship. However, most advocates make their choices in the context of options defined and supported by the advocacy office staff. Without a complex and flexible scheme for defining potential advocate roles, the complex and varied needs of potential protégés will be funnelled into only a few categories of response.*

*There are at least three dimensions necessary to define an adequate range of advocate roles:*

*1. The distinction between formal and informal relationships.*

*(a) Formal relationships that are created by the due process of law and include purely instrumental roles (eg. conservator, or guardian of property) and instrumental-expressive roles (eg. adoptive parent, or plenary guardian of a person).*

*(b) Informal relationships are created by the choice of those who are party to them.*

*2. The instrumental-expressive action continuum where instrumental actions are taken to solve practical, material problems, and expressive actions are taken to meet needs for communication, relationship, support and love.*

*3. The degree of demand experienced by the citizen advocate in the relationship.*

**Assessment of the Team**

Out of the current 34 relationships in the program, there are 2 formal relationships. It is not uncommon for the majority of Citizen Advocacy relationships to be informal rather than formal. The majority of relationships supported by the program are instrumental expressive relationships, which is to be expected in that most relationships have both instrumental and expressive dimensions. However, in order to build the capacity to respond to a very wide range of relationships needs and roles, further attention could be given to initiating matches which are primarily one or the other (instrumental or expressive).

The team found that the Protégé Recruitment Plan incorporates recruiting protégés who may need an advocate to take on informal roles in their lives. However, out of the 15 potential advocacy roles available to advocates, the program has planned for this year, 6 were for instrumental /expressive roles, and 2 for instrumental roles. There is no discussion around the level of demand in those roles incorporated into the plan.

As the program plans for increasing the diversity of current and planned relationships in the areas outlined above, it would be important to design strategies for implementation of each area, and then develop a method to track whether or not those strategies are implemented over time. The team did note that while some of these areas were addressed in past planning and some strategies were stated, the follow up in implementation appeared to be a bit loose. Overview and involvement by the Board may be an effective means to ensure that planned strategies to increase the diversity of advocate's roles are implemented.

### **Recommendations**

In striving for more balance, the program could give attention to recruiting advocates for people who are likely to have needs that call for a formal role to legitimize and empower the role of an advocate, such as guardianship, adoption, power of attorney etc.

Incorporate into the protégé recruitment plan some advocacy roles focused purely on either (instrumental or expressive), with particular focus on the “level of demand” match with the type of role. Eg Expressive advocacy role of high demand

Discussions and involvement with and by Board around the issue of diversity.

#### **• Availability of crisis advocates (CAPE rating R1423)**

Description from CAPE

*Situations will arise in which a person has a critical, immediate need for representation or instrumental support. The typical process of recruiting, orienting, and matching advocates will be often too slow for needed immediate response. In addition, a protégé who is already matched needs to avoid involvement in crisis situations which are so demanding as to strain the ability of the advocate to support the relationship. In order to ensure that the advocacy office can adequately represent people in crisis without drawing staff into a service-providing relationship with an individual protégé, the office should recruit and support a number of stand-by, crisis advocates. Crisis advocacy relationships will typically be instrumentally focused and time limited, though the potential exists for the advocate (and where possible the protégé) to choose to broaden their relationship after the crisis situation is resolved.*

### **Assessment of the Team**

The team met with one advocate who had taken on a crisis advocacy role, and the program appears to have people at the ready to take on a crisis role should it arise. There obviously has been growth in knowledge and understanding around crisis advocacy since the program’s last CAPE. However, there are areas of confusion around the crisis advocacy role by the crisis advocate themselves. One Crisis advocate stated “I’ll always be here for him”. Therefore, when does the crisis end? There was one crisis relationship that at the time of the evaluation had been going for over 3 months. Crisis advocacy roles are meant to be very short term and specific.

Essentially a number of people in the program’s network should be asked to be available to respond to a crisis in the event that the program learns of someone who is being evicted, or is in a hospital emergency room, or is arrested, or is experiencing some other emergency situation to which someone needs to immediately respond. The crisis advocate should be oriented to the principles of Citizen Advocacy, the types of crises that may occur, the kinds of responses that would be most helpful, and other topics related to potential roles of crisis advocates.

Further more, it was a concern to the team that the program is uncertain about what is actually a crisis and what does it mean for someone to be in crisis. In fact for some of the protégés previously recruited at the time of recruitment their lives were actually in crisis.

Perhaps it would have been better to recruit a crisis advocate in to the protégés life, than waiting 10 months to bring an advcoate in to the protégés life, only to have the staff meet with the protégé each week.

### **Recommendations**

Discussions for the program may need to occur in order to further develop the program's understanding of the role. These discussions could occur around:

- a) What are typical scenarios that people are often found in a crisis
- b) When is the crisis over?
- c) How to approach the crisis advocate about completing their role.
- d) Opening doors to (if needed) a long term advocate
- e) Need to further develop one\s understanding of the role.

Plan to refresh training and update crisis advocate preparedness.

Review what constitutes a 'crisis' (perhaps by breaking down into immediate versus long term needs when visualizing need.)

Incorporate into protégé recruitment plan how many protégés in crisis that the program will potentially recruit in one year.

Discussion with program staff and Board around "crisis advocacy", and what constitutes a "crisis advocate being recruited" and "when should one leave", and how to complete the role with the potential for a long term advocate, if deemed necessary.

### **Involvement of youth advocates (CAPE rating R1424)**

Description from CAPE

*Citizen Advocacy offers your people a unique and powerful opportunity to service handicapped people in a personal, essentially non technological, way. As well, many handicapped people, regardless of their age can benefit form a relationship with a young person. Whilst most young people have not developed their skills or status to be fully effective representatives of a handicapped person's interests, they can give and gain much from involvement as a second advcoate to a person with substantial need for spokesman ship or other instrumental action. In some situation a young person might service along as a citizen advcoate.*

### **Assessment of the Team**

The team found that at present there are no advocates under the age of 18 years. At the time of recruitment there was no plan for youth advocates to be involved in the lives of people with disabilities.

### **Recommendations**

The team suggests the program look at the benefits of youth advocacy particularly when recruiting protégés under 18 years of age.

Incorporate into the annual advocate recruitment plan, ways to recruit and identify potential youth advocates

- **Avoiding social overprotection (CAPE rating R143)**

Description from CAPE

*CA is founded on the conviction that - eventually if not immediately - citizen volunteers can be recruited and supported to provide handicapped people with as much support and/or protection as they need and not more. This requires: (a) that the CA office identifies protégés who need formal relationships and recruits advocates willing to provide them (this is rated in R1421 Diversity of current advocate roles); and, (b) that the CA office minimises the possibility that a relationship will be socially overprotective (rated here).*

*Socially overprotective practices are based on a presumption that handicapped people are less capable of exercising their rights and meeting their needs than they in fact are, or could become with increased responsibility. Social overprotection is detrimental both in reducing the level of development challenge a person experiences and in its contribution to the stereotyped perception of incompetence.*

### **Assessment of the Team**

The program is aware of the social overprotection that is a typical and common experience in the lives of people with an intellectual disability. These issues are addressed in the initial stages of the advocates coming to the program. It is talked about from the beginning in orientation. Also it is in policy documents.

There were however some advocates who were struggling a little around this issue particularly with either the service or the protégés parent.

### **Recommendations**

Review how many current advocates there are who are concerned about speaking up to family members or carers/services workers about the issue of over protectiveness.

Plan or look at strategies that staff can use in follow along and support activities that will encourage advocates to tackle the issue.

### **Principle five: Positive interpretations of handicapped people**

- **Positive interpretations of handicapped people (CAPE rating R15)**

## Description from CAPE

*The advocacy office should be a model in the interpretation of handicapped people. This implies both a systematic, highly conscious orientation to avoiding various types of deviancy-image juxtaposition and actively seeking the most positive possible and yet honest interpretation. This does not mean that the advocacy office will deny the existence of people's handicaps, or the nature of their social situation.*

*Various types of deviancy images and powerful historic negative role perceptions have been described in detail by Wolfensberger in *Normalisation* (Toronto, 1972) and by Wolfensberger and Glenn in *PASS 3* (Toronto, 1975). Interpretations that suggest these negative roles or images, even very subtly, contribute to the devaluation of people with handicaps.*

*Specifically, the program should avoid places actions, or images, which connect, handicapped people with images or practices which connote:*

- death or decay
- sub humanity
- animality
- menace
- triviality, worthlessness
- sickness
- pity or charity
- eternal childhood

*Instead, the advocacy office should seek the most highly positive, value-conferring and yet valid possible associations which support the developmental growth potential, citizenship role, and individual human personhood of people at risk of social devaluation.*

## **Assessment of the Team**

Capricorn Citizen Advocacy presents a positive image to the community by its location, image of Board and staff, written materials and its plan for fundraising methods. The office is located in a fine location. The language used in written materials, presentations and in the key activities interprets people with disabilities in highly positive ways.

However despite the above mentioned, the team was concerned about several other areas particularly around the program's image of being seen as a disability program or service. This was demonstrated by advocates verbally, board members and also advocate associates.

## **Recommendations**

The team suggests that Board members reflect on:

- how they speak about the protégés in the program.
- the program's position amongst the human service system
- the program being all to all people with disabilities
- the program seeing itself as "being a response" to all. (recognising that other responses) other than CA may be appropriate, and being aware of those responses, too.

### **3.2. Citizen Advocacy Office Effectiveness**

Description from CAPE

*The impact of a Citizen Advocacy office depends on the availability of sufficient staff time to effectively perform a balance of seven key activities, which, include: protégé recruitment, advocate recruitment, advocacy orientation, matching, follow-up and support, ongoing training, and involvement of Advocate Associates. These activities will back up and Coordinator volunteer citizen advocates so as to maximise the probability that their protégés will experience continuity over time despite changing needs.*

- **Vision and creativity of protégé recruitment (CAPE rating R21)**

Description from CAPE

*Protégé recruitment practices have a strong influence on the direction of the advocacy office's development. If protégé recruitment is confined to a narrow group of people, it will make the development of an adequate range of advocate role options either impossible or reliant on significantly over or under servicing some protégés. If protégé recruitment is essentially a passive process which relies on human service agencies for protégé referrals, it is possible that many people most in need of Citizen Advocacy will be screened out as 'unsuitable for a volunteer' or even as a person for whom service providers are disinterested in active spokesman ship. If protégé recruitment does not result in valid information, which clearly defines protégé needs, preferences and characteristics, advocate recruitment cannot be targeted precisely.*

#### **Assessment of the Team**

The team in the interviews with the Coordinator learnt before any protégé recruitment is undertaken, an Internal Relationships Review is done in order to develop the protégé recruitment plan for the year. This review and development of the protégé recruitment plan is done with a Board member and is approved by the Board of Management.

The Protégé recruitment plan consists of the age of the potential protégé, sex of protégé, type of potential accommodation, geographical area where protégés may be residing, what type of advocacy role the advocate could play, and whether the potential protégé would be in need of a formal or an informal role asked of the advocate.

The Coordinators utilise various strategies in their attempts to recruit protégés. Some of these strategies are:

- i) Coordinators currently recruiting protégés from:
  - a) group homes
  - b) nursing homes
  - c) schools
  - d) hospitals
  - e) street culture
  - f) caravan parks
  - g) boarding houses and hostels



- ii) Coordinators volunteering at the Food Van in order to identify potential protégés
- iii) talking to parents and parent support groups
- iv) talking to people in the local community, especially always looking for children
- v) approaching Dept of Child Safety again with an emphasis on children
- vii) tracking a person eg: Coordinator tracking a potential protégé after seeing him involved in the street culture
- viii) staff using their own personal networks
- ix) staff asking advocates associates

Currently the staff are focusing with a priority on children. Both Coordinators spoke about their concerns in not being able to identify and recruit young children. This is a struggle that is common amongst Citizen Advocacy Programs, however, one that can be overcome with developing creative strategies along with Board members and other interested parties.

It is obvious that since the last CAPE a lot of thinking has occurred in order to actively recruit vulnerable people. There has been a great effort in getting back into the street culture scene along with recruiting children. Although the majority of protégé recruitment is active, with minimal recruitment being passive or a referral type of recruitment, there is a great awareness of the need to be actively looking for protégés. To be talking to people who may be in the know. To be actively establishing “look out supporters” of the program who can inform staff about someone.

Coordinators each spend time with a potential protégé and both are involved in the development of a profile of the person recruited. They both spend some time with the person, talk to the people close to the person if needed, try to understand the hopes, dreams and aspirations of the person. Issues surrounding the person’s life are talked through extensively between Coordinators in order to have clarity as to how an advocate could respond.

Although much work has been done around this, it is not always clear about the perceived needs of the protégés and what was the perceived role of the advocate in the protégé’s life. As mentioned earlier in this report, the protégé’s situation is very well described but the pulling out or defining the realities of the persons’ needs are lacking.

The program is clear about working to a recruitment plan, however, there is a lot of looseness around the plan. We understood the protégé recruitment plan to be the general work plan as stated by the staff and Board members during their interviews. Although, there was no mention for the recruitment of a protégé who may not reciprocate a relationship, or a protégé who may need vigorous spokemanship or even a time line of when this recruitment is going to occur. Further to this, the current plan really reflects a statement of what the program will do. No strategies are in place in the plan as to the how, when, what, or who. Therefore the program may wish to review its current protégé recruitment plan and reflect on what possible strategies need to be incorporated into that plan in order to make the plan an actually working one.

It is for the direction of a program. With that a real safeguard for the program, and one that can be regularly reviewed at Board meetings, and staff with their work in office discussions.

We would suggest when doing the Internal Relationship Review not just to focus on the more statistical type of information currently gathered, but on other areas as well. The current information is very general and doesn't really give you a clear picture of how the program is identifying potential protégés. We strongly suggest to the program when conducting its review to look at reasons why these protégés were recruited, where does the protégé come from, how did we learn of the protégé? What were the perceived needs for advocacy action for the protégé? What was the role asked of the advocates for that protégé?

Currently the information in the relationship files is a bit loose, particularly around how the protégé was initially identified, which doesn't help a program reflect on current practices, nor does it help identify themes creeping into key activity practices which could undo a lot of the good work that has been done by the program.

In determining the protégés who were recruited, the team looked at some of past protégés recruited into the program. This information was obtained through files, interview evidence and Coordinator reports.

When you start to closely look at where you are learning about protégés, a lot of protégés are being brought to the program's attention. Of course the team also acknowledges that staff could have been approached by these people to look out or keep in mind that they were looking for protégés, but there isn't any written evidence of that.

It would be of concern if the only way that the program was learning about people in need of advocacy, was from other people telling them. This can have varying implications for the future. Therefore it is important to be disciplined and diligent in reviewing your practice around this key activity.

It is also a bit of a concern to the team about several protégés that the Coordinators had brought to the attention of Board at meetings in their report, who often disappear and aren't heard of again in future reports. How does the Board learn about what happened to these people? And when do you determine if you will recruit that protégé in to the program? When and how do you decide? There is no real evidence about Board involvement in the discussion. How do you follow up on this as with several people mentioned in past reports and Board meeting minutes, their situation was really serious? Both Coordinators during their interviews indicated that they experienced difficulty at times adhering to the recruitment plan, especially when they meet someone in need who is not targeted in the recruitment plan and not in a crisis situation. The Board needs more direct involvement with this difficult decision making.

### **Recommendations**

Prior to any protégé recruitment plan being designed a full internal relationship review be conducted at the end of each financial year, examining more closely protégé recruitment methods, in particular the why, how and what and by whom.

Tighten up the protégé recruitment plan to include strategies, time line, potential situations that protégés could be found in, points of locations/areas that protégés may need advocates and how many protégés who may be in crisis.

Meet with people and Board members to have a brain storming about “where can we possibly identify children?” Look at creative ways to get to these children. Who do you know that can meet with the program about helping you gain access?

Document how you came to hear of the potential protégé. This will safeguard the program from any potential to drift into a dependency on others to tell the program about people.

The Board to be more involved in understanding and working collaboratively with the Coordinators on the more difficult aspects of decision making regarding protégé recruitment, especially around people being brought to the attention of the Board then not heard of again.

Seek out areas that the program hasn't yet visited or know much about.

Be very careful about the length of time getting to know a protégé.

- **Advocate recruitment (CAPE rating R22)**

Description from CAPE

*Effectiveness in advocate recruitment results in a growing number of people becoming involved in each of the fifteen possible Citizen Advocacy roles. Ensuring effectiveness requires a written plan which is updated at least annually, which specifies target groups for recruitment, recruitment objectives, time-lines, and a variety of options for recruitment activities; is coordinated with the protégé recruitment plan; and is intended to track performance. Advocate recruitment strategies, which rely on direct, person-to-person efforts, which are specific to the defined, needs of a particular protégé have proved most effective. Second in effectiveness appears to be presentations which are planned to interpret specific protégé needs to a target audience selected to ensure a high likelihood of producing people who would accept a particular advocacy role. Generalised public appeals, or generalised presentations to unselected groups, have shown only minimal return compared to more specific tactics.*

### **Assessment of the Team**

Advocates are recruited into the program by a variety of ways. Both Coordinators have used community contacts, personal friends, different associations, FM radio, service contacts, presentations, other advocates, advocate associates, Board members, Rotary, Food Van, Auslan Classes and supporters of the program.

The advocate recruitment is always focused around the protégé profile and the type of advocate is incorporated in the advocate recruitment section of the General work plan.

Both Coordinators are very willing and able to ask people to come forward to stand beside people. There appears to be a constant vigilance by the Coordinators of people who could become potential advocates.

The team concurred that there were some themes developing in advocate recruitment that the program may not consciously be aware of. Although these themes are not bad, it is in determining the balance that is the safeguard. Although the program has a high consciousness to the issue, the team found that there was an over reliance on some service workers around advocate recruitment. This therefore can lead to the practice of going around in circles when looking for a member from the community who are independent from any potential conflict of interest. There was a potential theme developing around having “professional people as advocates as opposed to the everyday person”. Further thought might be given to this and explore other areas that the program may identify people from.

### **Recommendations**

The program whilst undertaking the Internal Relationship Review each year should look at “how did we meet advocates or learn of the potential advocates?” This again is a great way of reviewing work practices in particular how the recruitment strategies were effective.

Reference the needs of protégés and the skills & competencies that could meet these needs along with the projected advocacy role and potential qualities of an advocate.

Strive to create greater networks in the Yeppoon area.

- **Advocate orientation (CAPE rating R23)**

Description from CAPE

*The orientation required by advocates who are beginning a Citizen Advocacy relationship provides them with a necessary framework of understanding. Orientation can be productively provided into pre-match and post-match time blocks. In whatever minimum time is allocated to orientation, there should be adequate coverage of at least:*

1. The social situation of handicapped people;
2. *Description of the basic principles of Citizen Advocacy, with special reference to advocate responsibilities to protégés, and to the full range of necessary Citizen Advocacy roles;*
3. *Clear description of the role and function of the Citizen Advocacy office from the perspective of what advocates can and should expect from staff and Advocate Associates;*
4. *Information on a range of effective means of meeting the advocacy needs of handicapped people;*
5. *Information on other available resources to assist advocates and protégés; and*
6. *Specific information necessary to an initial sense of understanding and competence in undertaking a chosen advocacy role.*

### **Assessment of the Team**

The team learnt from the Coordinators that the orientation starts with the advocate at the initial meeting, focusing on the protégé and his or her needs. There is a formal orientation discussion with an advocate which outlines: the principles of Citizen Advocacy, the individual protégé, discussion on protégé and their needs, life experiences of the person and common life experiences of people who are devalued.

There are also discussions around, what services do, loyalty to protégé and advocate independence, conflict of interest and the role being a changing role over time. Expectations are made very clear to the advocate about their role, and that the advocacy action can take people into new lives. Coordinators usually conduct 2 to 3 sessions informally with the advocate and these sessions which are individualised lasts usually 1 – 2 hours. These sessions are generally planned for and the program has an orientation checklist guide which the two coordinators use. Videos are also shown to the advocate with a follow up discussion. Coordinators feel and believe it is vital to tell the stories of what has happened for protégés and how an advocate can best support a protégé.

The majority of advocates interviewed stated that orientation was good and worthwhile and they really got a great deal out of it. Well done. The program is clearly striving to impart the best information at all times.

### **Recommendations**

The team suggest that you use a planned approach to the advocate orientation. That is, plan how long each session should be and any sessions that are necessary for an individual advocate to get through the content needed and what aids might be needed – overheads, videos, extra reading (eg. “Christmas in Purgatory”). For example if a protégé is homeless what content should you present to an advocate? How does one understand homelessness?

Select locations that are quiet and where material can be presented and where questions can be asked that will provide an atmosphere conducive to serious advocate orientation. Over lunch or at the coffee shop may not always be the best place for this, sometimes it might be.

Develop further handouts/material that can be used in relation to creating valued roles for protégés.

Most importantly keeping in mind the protégé’s needs, lay out some specific requirements of effective advocacy – including the important principles of independence and loyalty to the protégé and their relationship to the office and to other structures, like human service and sometimes family members.

- **Advocate - Protégé matching (CAPE rating R24)**

Description from CAPE

*Matching involves the selection of an advocate and a protégé who are likely to begin a successful relationship, and providing an initial structure for introducing each to the relationship. In terms of advocacy office staff activity, the quality of the match depends on:*

1. *The quality of information available on the specific needs, personal characteristics, and preference of individual protégés.*
2. *The quality of information available on the advocate initial expectation, the type of advocacy role he/she is interested in, the level of advocate commitment and advocate skills, personal characteristics and preferences. What becomes apparent here is the utility of advocate recruitment methods, which are specifically targeted to well defined protégé needs.*

3. *The ability of the staff performing the match to select advocate/protégé pairings, which provide a best fit between, advocate expectations and characteristics, and protégé needs and characteristics.*
4. *The ability of the staff devising the match to (a) predict areas of a relationship which are apt to lead to confusion, initial disappointment, or conflict; and (b) to structure initial contacts so as to minimise potentially negative experiences.*
5. *The ability of the staff devising the match to sensitively and positively interpret the need of each person to the other.*

### **Assessment of the Team**

The team learnt that after an advocate has been recruited, the Coordinators discuss whether the potential advocate has the abilities, skills and understanding to take on the desired advocacy role. Also, during the orientation, further thought is given to determine whether or not this is likely to be a good fit. Matches are based on the needs, interest and characteristics of the protégés as well as the capability, background and characteristics of the advocate. Both Coordinators strive to help matches get off to a good start through discussion and initial follow up.

The team during their interviews with advocates learnt that some advocates had mixed feelings about their role and whether they were the right person for the protégé, or felt that they were impotent in their role. One protégé clearly told the team that her relationship with her advocate was a “mismatch”.

### **Recommendations**

To further improve the matching process we would suggest the Coordinators conceptualised the match around the protégé’s needs and the advocate’s ability / competence / time and other relevant aspects to meets those advocacy needs.

Focus advocates to needs of people otherwise they may miss them and the advocacy effort is insufficient and/ or irrelevant.

Set clear expectations via several opportunities and ways as to what the advocate is expected to do.

Develop a means to evaluate and regularly review matching procedures.

Broaden the dialogue that currently occurs between Coordinators around matching, to involve Board members or others who have insight and sensitivity towards the fundamental needs of people with a disability. Such discussions would also be an effective Board involvement and development strategy.

Review discontinuations with Board members in order to identify ways of building and supporting relationships more effectively.

- **Follow-up and support (CAPE rating R25)**

Description from CAPE

*Follow-up and support activities are distinct, but closely related. Follow-up includes regular, systematic, low profile checks on the status of each relationship; provides the CA office with a measure of its effectiveness in meeting the needs of protégés; and identifies an advocate's need for support.*

*Support activities provide practical and, when necessary, emotional support to advocate/protégé relationships. The rating assesses the responsiveness of the CA office to needs for follow-up and support and the ability of the office to balance responsiveness to advocates' and protégés' needs with avoiding intrusion on developing relationships.*

### **Assessment of the Team**

There is a planned approach by the Coordinators about who is going to do support and follow along to various advocates. The follow along is usually planned for every week and monthly, particularly around who needs to be contacted. The follow along is conducted by both Coordinators, and is usually by telephone, email and sometimes face to face contact. The follow along records are on a spreadsheet system and all follow along is imputed into the computer. The follow along is consistent and support is readily available. Nearly all advocates the team met indicated they were in regular contact with the Coordinators. Both Coordinators are consistently in contact with advocates. Both Coordinators are striving to determine the essence of the relationships and to provide support, guidance and discussions when needed.

The team learnt during the Coordinators interviews that at times they both feel unable to challenge advocates particularly around challenging services or family members. The team also learnt that there is too much involvement in the relationship after the matches have been made as previously discussed under Clarity of Staff Function. Therefore important to be very disciplined here with support and not wanting to do the advocacy. Coordinators need to step back and allow the advocates to take some risks and believe that the advocates can. Allow the advocate to own the responsibility. Again there has been good work established here, well done.

### **Recommendations**

To further improve the follow along and support activity, it is suggested that the follow along discussion be more focussed around protégé needs and the advocate responses and role to those needs. Go back to what you initially asked the advocate to do. It's not just about having a chat about one's children or other personal life experiences of either the advocate or Coordinator. It is about the protégé needs and the advocate's role in their life.

For advocates facing similar situations, we suggest you bring those advocates together to further support and encourage them in their advocacy efforts, so they do not feel inadequate as an individual. Meeting and knowing others doing the same is often also a real motivation.

While all the relationships are independent, the office need not fear intruding. It is after all providing guidance and offering questions to further focus, motivate and energise advocate activity. The office is not taking control of the relationships in supporting relationships this way.

Coordinators need to look at ways to conduct follow along and support in areas that are creative and encourage advocates to create a vision for their protégés or look at creating valued roles for the protégé. Possible discussion around creating a vision for the protégé.

- **Ongoing training (CAPE rating R26)**

Description from CAPE

*As advocates become involved in their relationships, some will desire additional training in some aspect of concern to the relationship. While orientation and follow along are necessary for each advocate, ongoing training should be available according to the choice of individual advocates. For efficiency, the advocacy office itself should only provide training when no other suitable sources of training are available. In particular, the Citizen Advocacy office should carefully weigh any decision to provide technologically oriented training on handicaps, available resources, etc. or training that would be better presented by people who practice another advocacy form. Highest priority for CA office-sponsored should be exploration of the values necessary for provision of moral services, and the handling of CA challenges and dilemmas.*

### **Assessment of the Team**

The program currently has ongoing training events at various times throughout the year. In the past there has been several workshops with various guest speakers and presenters coming into the program. Advocates are also encouraged and informed about other additional training or workshops being offered by other agencies, groups etc.

It is suggested that there could be some specific discussions around themes such as “Having Higher Expectations of your Protégé”, or “Understanding Vulnerability”, or “Creating a Vision”. It would also be beneficial for the program to look at deeper discussions instead of some of the previously presented workshops. Advocates really don’t need to attend a CAPE workshop.

The team did learn from the Coordinator interviews, board minutes and coordinators reports, that it was only up until just prior to the CAPE, that the Coordinators were reporting on all training within the key office activities. Ongoing Training is only for advocates. The Program really needs to be clear on that. Board and Staff training and development doesn’t come into Key Office Activities.

### **Recommendations**

Plan to have ongoing training sessions on a more bi or tri monthly basis, plus additional external opportunities that comes from “hearing” the support needs advocates are indicating when doing follow along.



Plan each session to be focused on a specific theme, with advance notice being given to advocates so they are aware of what is coming up and when.

For advocates closer to Yeppoon, the program may wish to think about having a workshop closer for the advocates.

- **Advocate associate emphasis (CAPE rating R27)**

#### Description form CAPE

*Advocate Associates are volunteers to the advocacy office who possess skills and knowledge useful to advocates and protégés. From time to time, an advocate associate can offer advice and perspective on such matters as the technical dimensions of the services which a protégé receives or seeks to receive, strategy development for management of a demanding situation, or advice on technical matters that have relevance to the relationships (e.g., advocate on managing an issue related on guardianship of property). A sufficient number of active Advocate Associates provides a safeguard against staff being drawn into individual advocacy activities, and provides a major support to advocates and their protégés who chose to avail themselves to their counsel. Advocate Associates should be respectful of the advocate role in the relationship, and should avoid supplanting efforts the advocate is willing to make.*

*The advocacy office should recruit, orient and actively utilise a number of Advocate Associates who represent a variety of technical skills. Further, staff should actively link advocates to Advocate Associates, as necessary. Advocates should be informed of the availability of Advocate Associates, the skills they possess, and how to gain access to them.*

#### **Assessment of the Team**

The program currently has 16 advocate associates available to advocates in the program. Whilst the current Advocate Associates are people with skills in mental health, Centreline, housing and legal, it would be really beneficial for the program to have people who can bring other areas of expertise to the program. Improving this area could be as simple as reviewing what other kinds of expertise advocates might benefit from, and reviewing who in the Capricorn Citizen Advocacy network has relevant expertise and might be willing to share their knowledge. These could be a parent of a person with a disability, siblings or people with a disability, a naturopath, myth buster or simply a wise person who can see through issues clearly.

It is not about having Advocate Associates, it is about having Advocate Associates that advocates need and will utilize.

It was also stated by two Advocate Associates that they hear of the advocate through the Coordinators and only deal with the office staff. They tell the office staff what to report back to the advocate. Not all Advocate Associates have been orientated to their role and are clear on their role.

It was also stated that staff use the Advocate Associates for clarity particularly around referring protégés, or staff contacting advocate associates to learn what the advocate associate knows of the protégé, or whether the advocate associate believe citizen advocacy to be a good response for the potential protégé. Advocate Associates are for the protégés and advocates, and not generally used as a support or consultant for the citizen advocacy coordinator or program.

### **Recommendations**

Ensure all Advocate Associates are orientated to Citizen Advocacy principles and practices.

Plan to recruit Advocate Associates who best reflect the current support needs of advocates.

Do not become the go between. Give advocates the contact numbers so they can do the contacting.

Do not continually use Advocate Associates as consultants or professional advisers to the staff and board. Be clear as to their role and function as advocate associates

- **Balance of CA office activities (CAPE rating R28)**

Description from CAPE

*The seven previous ratings have examined each key activity in turn. This rating requires consideration of the balance of these activities and its likely long-term effects. A CA office, which has an effective balance of activities, will do enough of the right thing at the right time to ensure that it will achieve its mission. Some examples of an ineffective balance of activities follow:*

*A CA office may have an ineffective balance of activities in consequence of doing the right thing at the wrong time. For instance, staff may spend a disproportionate amount of time in advocate recruitment before protégé recruitment is well established. This typically results in a substantial delay between the time an advocate volunteers and the time she /he is matched, and could lead either to imprecise matching or advocate drop out.*

*An office may over invest its time in one activity at the expense of another needed activity. For example, if time is spent on recruitment at the expense of supporting advocate/protégé relationships the office may lose relationships, which have the potential to develop to effectively meet protégé needs.*

*An office may do too much of a needed activity. For example, staff may become overly concerned with protégé recruitment early in the office's history and make extensive efforts to 'get referrals'. This may result in a backlog of protégés too large to match effectively.*

### **Assessment of the Team**

It was the team's judgement that the program has adequate resources for sufficient staff, and that the current balance is quite good for the key office activities given the size of the program.

Besides deciding what and who is needed to staff the program, a function of Board governance is to exert an overview on allocation of staff time to various activities. The Board can help the staff develop a more effective use of time, by reviewing the balance of key activities with staff, particularly if there are any staffing pattern changes. For example, the Board might ask the staff on occasion to estimate how much time is being devoted to each key activity and then discuss together what activities might be getting too much attention, and which activities are not getting enough attention?

A role of the Board is to ensure that the primary focus of the Coordinator's attention is on the key office activities and should strive to minimize time spent on activities that take time away from making matches and supporting relationships, even if some of those activities are necessary (such as speaking with funding body, organising fundraising events).

### **Recommendations**

The two Coordinators to plan the key office activities over a monthly period to develop a gauge on balance of all key office activities

Board members to become more involved in the overseeing of the overall balance of key office activities.

- **Encouragement of advocate involvement with voluntary association (CAPE rating R29)**

Description from CAPE

*Citizen advocates can derive multiple benefits from membership in a voluntary association concerned with class advocacy on behalf of people who share their protégé's handicap. Often, they can find a source of information, personal support, and civic influence, which can potentially benefit their protégé. As well, based on their personal knowledge of their protégé's situation, citizen advocates can make a substantial contribution to the effectiveness of a voluntary association. While it would be inappropriate for the Citizen Advocacy office to require the advocates and protégés to join voluntary associations, membership should be actively encouraged.*

### **Assessment of the Team**

The team heard from both Coordinators that there is no real awareness or consciousness of the issue, along with not having any real discussion about voluntary associations in the past. The team heard that the only other groups around are really parents support groups.

### **Recommendations**

The program may need to review and seek out who are the like minded people/groups around the area that advocates could be encouraged to join.

The library of resources might contain directories of associations.

Re-evaluate the relevance and potential potency of (where applicable to protégés needs) an advocate being supported to be involved with voluntary associations.

- **Sufficiency of CA office staff (CAPE rating R210)**

Description from CAPE

*Though Citizen Advocacy is a volunteer effort, the key activities, which establish and support volunteer relationships require the contribution of staff that is (a) full time, and (b) almost always paid.*

*The current state of knowledge does not permit the writing of an exact, or even an approximate, staffing formula for Citizen Advocacy offices. However, many programs are in fact understaffed and cannot manage all the necessary seven key activities for the number of relationships they carry; raters should exercise their best judgment in terms of required workload and growth potential.*

### **Assessment of the Team**

At the time of the evaluation there were 34 relationships with an additional 12 matches to be made each year. Against this scenario, there are 2 program staff members employed for a total of 60 hours per week (including 15 hours of clerical/office support).

At present, the number of staff is adequate for effectively and efficiently performing the key office activities.

## **3.3 Program Continuity and Stability**

Description from CAPE

*If the advocacy office is to support citizen advocates who maintain long-term relationships, it must maintain itself over time. If staff are to have the capacity to perform the key activities required to develop and to support the program, there must be a stable organisational and financial context. These ratings assess features of the program structure that contribute to program continuity and stability.*

- **Feasible governance and guidance structures (CAPE rating R311)**

Description from CAPE

*Implementing and maintaining an advocacy office offers a variety of challenging organisational problems. The program should have a Board and advisory committee structure, which maximises the involvement of local citizens in controlling and advising the program.*

### **Assessment of the Team**

Currently the Board of Management has 5 members. Although small, the team noted the efforts on the part of the Board to provide more efficient and effective support to the program. The team also noted that the Board members have a great deal of talent and are very capable of a higher degree of governance and control. However, the Board is encouraged to continue its efforts to provide a more planned approach to its activities and to be more clearly oriented to the Principles and Key Office Activities so as to provide a high level of guidance and support to the staff of the program.

With having such a small number of Board members, it leaves the program particularly vulnerable to the potential for collapse should key people leave or become ill, or the capacity to recruit and support new staff should it be necessary. There are no working sub committees, although there exists some working parties on various projects.

### **Recommendations**

Conduct a 'skills audit' (if not already done), which assesses the skills you have versus the skills required (especially those that *reduce the vulnerability* of the program).

Plan fully to recruit people with the right talents and moral orientation suitable to Citizen Advocacy and fully orientate them to the Citizen Advocacy model, the role of the Board, their role as a Board Member and the role of the Staff.

Establish several key sub-committees (that may also be composed of non-Board members) that provide close support to the program and also help to specifically define certain roles for those committee members.

- **Composition of governance and guidance bodies (CAPE rating R312)**

Description from CAPE

*The governing Board and advisory committee structure should reflect a balance of skills, identities, interest and abilities.*

### **Assessment of the Team**

The team noted the increasing array of Board members who come from varied backgrounds and occupations, and who have a variety of connections to their respective communities – all of which should facilitate the work of the Board in supporting the program.

### **Recommendations**

The program needs to carefully discern what each person brings to the Board and the support they may require in order to shore up those contributions for the benefit of the program. In addition to the excellent information provided by the Coordinators, Board members should explore opportunities to become personally involved in the key activities of the program. This develops a deep appreciation for the relationships and the work of the office as well as providing important opportunities for supporting and sustaining the challenging work of the Coordinators.

- **Level of leadership involvement (CAPE rating R313)**

Description from CAPE

*Members of the Board and advisory committees need to be actively involved in controlling and advising the advocacy office. Without such active involvement, the office will come to 'belong' to the staff with the probable result that program reputation and continuity will come to depend solely on staff who are, as a group, more likely to be transient than a well-established board. In that case:*

- *major Board involvement will be with the (possibly uninformed) hiring of new directors;*
- *the office will lack advice and guidance from a variety of people*
- *the office will have a narrowed base of community support, particularly when difficult, value-laden choices must be faced.*

### **Assessment of the Team**

While very clear involvements of the Board in the program exist, the team was concerned by the reduced involvement (perhaps due to only 5 Board members) in supporting and supervising staff in the key activities. The Board has the responsibility of determining the major goals of the program. Once these goals are determined, it is then the Board's responsibility to discern who and what is needed to fulfil those goals. A greater degree of oversight by the Board would give the Board a stronger investment in ensuring goals are met. The very nature of Citizen Advocacy entails extensive involvement of Board members in the key activities, possibly individually, but also in sub committee involvements if good matches are to be made.

The team also noted from interviews with Board members the reliance on the Coordinator for direction when making decisions about the program and any future work. Board members may need to think about the role of decision making in order to develop a deeper ownership of the program.

### **Recommendations**

Increase support of staff through general meetings, specific key office sub committees.

Plan for the utilisation of CAPE reports (as a safeguard – they are effective only to the degree they are implemented).

- **Long term funding potential (CAPE rating R321)**

Description from CAPE

*Many advocacy offices are destroyed by their over reliance on funds which are time limited (e.g., developmental disability funds) or temporary (e.g., various manpower -related grants). An office needs stable source for most of its funding, so as to avoid potential loss of program continuity and an annual panic about funding, and diversion of staff time from other activities. There should be a long-term financial plan, which specifies funding objectives, sources, and alternative actions for developing multiple sources of funding. In assessing long term funding potential, raters should distinguish between funds, which have a definite time limit, and funds, which must be reconfirmed annually but have not set time limits (such as a continuing legislative appropriation). Funds, which are indefinitely renewable but must be annually confirmed, should be considered as potentially stable.*

### **Assessment of the Team**

There is no long-term financial plan for the program at the present time. A program increases its vulnerability by relying solely on any single source of funding and by choosing a funding source which closely associates with direct service provision and may therefore be likely to attempt to influence advocates.

Strategies need to be developed in this area at a local, state and national level. The Board needs to develop links at each of these levels in order to ensure this strategy is well coordinated and likely to deliver financial security for the program.

### **Recommendations**

Develop a particular and long term vision and strategy for the operation of Capricorn Citizen Advocacy to become financially supported through a diverse range of funding sources.

- **Local funding participation (CAPE rating R322)**

Description from CAPE

*An advocacy office, which has evidence of strong local funding support, is in an advantageous position. Not only does local money demonstrate community confidence, it also provides a source of matching funds for a variety of funding from other governmental levels. Support may be in kind (donated space, time, or equipment), but is most impressive when it is in cash.*

### **Assessment of the Team**

The program has not been able to date to secure any local funding or raise various funds through various fundraising events. This is often a difficult task for Citizen Advocacy programs, but is achievable.

The team does recognize the great vision the program has for the “Grand Idea”. We wish you well with this endeavour for the future.

### **Recommendations**

Seek the advice and support of people in the Rockhampton, Yeppoon area, who know how to fundraise effectively (and are neither in conflict or competition), and who will offer ideas to the Board on strategies, as well as leads to funding.

- **Program legitimisation (CAPE rating R323)**

Description from CAPE

*An advocacy office’s position with funders depends in part on the degree of legitimization it enjoys. At the lowest level, this involves the capacity to attract endorsement in seeking funds from a distant treasury. More significant is recognition by a community or high-level planning or fund-allocating Board (a state’s development disability plan, or the decision of a provincial-level civic association to act as a fund raiser, etc.). Governmental action, which authorises the program without appropriation of adequate funds, constitutes the next level of legitimacy. At the highest level is the presence of an endorsement or a mandate to provide the program, accompanied by authority and money for operations...*

### **Assessment of the Team**

The program enjoys the ‘official’ legitimisation that comes with governmental recognition and funds to fulfil your mandate



## **PART 4 THE TEAMS RESPONSE TO THE QUESTIONS OF IDENTITY, QUALITY & VIABILITY**

### **1) Adherence to Citizen Advocacy Principles**

*This section relates to the identity of the program, i.e.; if a program significantly adheres to the Principles, then it follows that it is doing Citizen Advocacy. Conversely, if it is not, then it is not a Citizen Advocacy Program, but something else.*

Having considered all the evidence contained in this section, the team has determined that Capricorn Citizen Advocacy is **most definitely** a Citizen Advocacy Program.

### **2) CA Office Effectiveness**

*This section is concerned with the effectiveness and quality of the office practices - the so-called “key office activities”. Another way to put this is to ask, is the office making good use of the Citizen Advocacy Model to make Good Matches?*

Having considered all the evidence contained in this section, the team has determined that Capricorn Citizen Advocacy is **most effective** in its use of the Citizen Advocacy Model.

### **3) Program Continuity & Stability**

*This section explores the programs viability over the long run - will it continue as a program, from a funding perspective and also from a governance and leadership perspective?*

Whilst certain governance questions remain to be resolved including the degree and diversity of funding, the team concludes that Capricorn Citizen Advocacy **is a viable** Citizen Advocacy Program.

## **ONCLUSION**

Using the Citizen Advocacy Model is not always easy. We would like to encourage you to consider the findings of this evaluation and to carefully and thoughtfully implement the recommendations of the team.

The process of external evaluation is never easy. The evaluated program must submit itself to scrutiny and analysis, and the evaluation team must endeavour to be fair and factual in its assessment. The team that evaluated Capricorn Citizen Advocacy clearly appreciated its responsibility, and embraced the task with seriousness and sensitivity. Utmost care was taken to ensure that the assessment was based on the evidence – data obtained in the course of the evaluation. Nevertheless, it is always possible that – given the volume of information that must be collected, and the relatively short time in which to gather and consider it, some pertinent facts may have been overlooked or misinterpreted. For such oversight or errors, if there are any, the team expresses its regret; however, we remain confident that the substance of the findings, and the issues they generate, give a true and valid depiction of the status of Capricorn Citizen Advocacy.

Capricorn Coast Citizen Advocacy is doing advocacy. People's lives are being changed. People's lives are being taken seriously. The work of the program is inspiring and is a great example to others striving to do Citizen Advocacy.

The team thanks the program for its cooperation, and the genuine warmth and hospitality extended to all of us. The team has learnt a great deal with this evaluation, and we wish Capricorn Citizen Advocacy all the best for the future.

**APPENDIX A**  
**CAPE CHECKLIST**

**CAPRICORN CITIZEN ADVOCACY**

**DATE: MAY 2006**

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**Advocate Independence**

R111 Unpaid Roles	Level 4
R11211 Internal promotion	Level 3
R11212 External promotion	Level 3
R1122 Advocate practice	Level 5

**Program Independence**

R1211 CA program separation from direct service	Level 4
R1212 Independent CA office location	Level 4
R122 Independence of funding sources	Level 1

**Clarity of Staff Function**

R131 Focus of staff role definition	Level 2
R132 Staff independence from other advocacy forms	Level 4
R133 Ties to the Citizen Advocacy movement	Level 4

**Protégé Characteristics**

R1411 Protégé age	Level 3
R1412 Protégé capacity for relationship reciprocity	Level 4
R1413 Protégé need for spokesman ship to defend human and legal rights	Level 4
R1414 Protégé need for long-term relationships	Level 4

**Diversity of Advocacy Roles**

R1421 Diversity of current advocacy roles	Level 3
R1422 Balance of current and planned advocacy relationships	Level 4
R1423 Availability of crisis advocates	Level 3
R1424 Involvement of youth advocates	Level 1
(R143) Avoiding social overprotection	Level 3
(R15) Positive interpretations of handicapped people	Level 2

**Citizen Advocacy Office Effectiveness**

R21 Vision and creativity of protégé recruitment	Level 3
R22 Advocacy recruitment	Level 2
R23 Advocate orientation	Level 4
R24 Advocate - protégé matching	Level 3
R25 Follow up and support to relationships	Level 4
R26 Ongoing training	Level 3
R27 Advocate Associates emphasis	Level 3
R28 Balance of key CA office activities	Level 3
R29 Encouragement of advocate involvement with voluntary associations	Level 1
R210 Sufficiency of CA office staff	Level 4

**Community Leadership Involvement**

R311 Feasible governance and guidance structures	Level 1
R312 Composition of governance and guidance bodies	Level 2
R313 Level of leadership involvement	Level 2

**Funding Related Issues**

R321 Long term funding potential	Level 1
R322 Local funding participation	Level 1
R323 Program legitimization	Level 4

## **APPENDIX B**

### **TEAM MEMBERS PROFILES OF THE** **CAPRICORN CITIZEN ADVOCACY** **EVALUATION TEAM MEMBERS**

#### **David Abela**

David has been Coordinator of Citizen Advocacy Sunbury & Districts since August 1991. He has a Bachelor of Arts (Recreation) and has previously worked as a community development officer for people requiring long term care from the effects of polio, a leisure Coordinator at the Royal Talbot Rehabilitation Centre for people with brain injuries and community recreation worker in a Victorian country town. David has been involved as a team member in four other CAPE's. He has also participated in SRV and PASSING events. David has four children and lives in a small country town near Sunbury, Victoria

#### **Heather Buck**

Heather is an Advocate and has been supported by Citizen Advocacy South Australia for the past 18 years. Heather is also a Board member of the program and has held the positions of Chairperson, Vice Chairperson, Secretary, and Treasurer and is currently the Public Officer. Heather has been involved in numerous subcommittees and is involved in the regeneration and growth of the program. Heather is passionate about growth of the Citizen Advocacy Movement and the inclusion of Boards in ties to the movement and the need for board specific training and development opportunities.

#### **Patrick Ruthven**

Patrick is Program Coordinator of Citizen Advocacy South Australia. Patrick's background is in Dramatic Arts and teaching. Since returning to Citizen Advocacy in 1999 he has been a keen participant in a number of Citizen Advocacy events. This is his third CAPE experience.

#### **Erin Forson**

Erin has been the Assistant Coordinator at Citizen Advocacy South West Brisbane for the past 7 months. Erin previously worked with people with disabilities for 8 years.

#### **Alison Figgel**

Alison has lived in Launceston for 14 years, she has a trade certificate as a chef and previously worked in this career for 11 years. Alison has been with Launceston Citizen Advocacy for 3½. previously as the Administrative Officer for 2 years and currently as Assistant Coordinator.

#### **Julie Clarke (Team Leader & Report Writer)**

Julie has been the Coordinator of Illawarra Citizen Advocacy in Wollongong NSW for the past 16 years. She has participated in numerous CAPE evaluations in both Australia and the United States in various capacities as team member, report writer and team leader. Julie is actively involved in the Citizen Advocacy movement.