

**CAPRICORN CITIZEN ADVOCACY
PROGRAM EVALUATION**

USING

**CAPE – STANDARDS FOR CITIZEN ADVOCACY
PROGRAM EVALUATION MANUAL**

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1. Overview of the CCA Program

1.1 Introduction

The Capricorn Citizen Advocacy Program (CCA) commenced in January 2000. In October, 2002 it held its first CAPE (Citizen Advocacy Program Evaluation). It held its second CAPE evaluation in May 2006, its third in August 2010 and now its fourth in November 2016.

Each evaluation has measured the impact of new staff and different combinations of board members on the processes and impact of the Program. Each evaluation has highlighted a *different* set of strengths and issues that each ‘era’ of the Program has needed to grapple with. It is interesting to appreciate such trends when assessing the same Program under changing conditions and yet appreciate the efforts of a small but dedicated group of people to maintain an effective Citizen Advocacy effort.

Each CAPE has demonstrated that CCA remains a Citizen Advocacy Program. This is no mean feat given the uncertainty of a funding climate that has seen many Programs drift into or be seduced into accepting funding opportunities at odds with their original Citizen Advocacy mission. Such a circumstance demonstrates the importance of regular external evaluation that every Citizen Advocacy (CA) Program should voluntarily undertake if it is to remain effective in making many good matches and maintaining singular focus upon a mission that is as necessary today as it ever was.

As in keeping with the diligent and continued practice of CCA, this team now presents the results of this fourth CAPE evaluation, and hope that it will add to the store of knowledge so far collected by Capricorn Citizen Advocacy in its 17th year of operation.

1.2 The Concept and Need for Citizen Advocacy¹

Citizen Advocacy was developed by Dr Wolf Wolfensberger in the 1960s. 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.;

¹ This and the next section are updated from equivalent sections in the 2002 & 2010 CAPEs which were also by this author, for those who have not read or had access to those earlier CAPE reports.

- 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 best elaborated and clearly explicated 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 The Capricorn Citizen Advocacy Program

Capricorn Citizen Advocacy commenced operation in January 2000. The Program's history extends back to 1994 when a group of agency leaders began to seriously question the lack of any form of advocacy for individuals with disabilities in the local region. These leaders became the Rockhampton Advocacy Development Focus Group (RADFG). They consulted extensively with others providing a range of advocacy responses within Queensland, throughout Australia, and even overseas! Significant information, guidance and support was provided by the then Advocacy Development Network, Advocacy agencies and several others who were well regarded in the Advocacy Movement. The group's discussions and explorations culminated in a study being conducted in 97/98 by Jude Hose and Carolyn Friend. The findings of the study indicated that the advocacy needs of local people were consistent with the type of response the Citizen Advocacy model could offer. Further discussions with Bob Lee and Eric Jones (Sunshine Coast Citizen Advocacy) sealed the group's decision to establish a Citizen Advocacy Program to respond to the advocacy needs of local people with disabilities. In early 1999, the RADFG changed its name to Advocacy Works and submitted a funding application to

Disability Services Queensland (the state disability services organisation). A local agency (Home Support Association) initially auspiced the group whilst its application to become an incorporated association known as Capricorn Citizen Advocacy was still being processed. Funding commenced in June 1999 with the first Coordinator, Marcus Richards being appointed in October 1999 but not commencing until January 2000. Capricorn Citizen Advocacy became fully incorporated in April 2000 at which time it asserted its independence and concluded auspice arrangements with Home Support Association.

The Program today is located within the Region of Rockhampton in Central Queensland and operates across the four former shires that were amalgamated in 2008, comprising Livingstone, Mt Morgan, Rockhampton and Fitzroy. Rockhampton has the largest population of approximately 86,500. The Livingstone Shire was re-established on 1 January 2014 following a successful de-amalgamation referendum in 2013, however the Program still operates across both the Rockhampton and Livingstone Local Government Areas.

Rockhampton supplies the needs of a vast surrounding region of cattle and other primary producers, situated some 40 kilometres from the coast. The town has many long-term residents as well as many itinerant workers and people who settle for various lengths of time. ‘Rocky’ has a distinctly rural and cattle business flavour – for which it is well known. It sits on the Tropic of Capricorn, which gives many regional activities – including this Program – its distinctive name. The city has many modern amenities and a rich history. The newer coastal communities of Yeppoon and Emu Park lie to the east, and the older and poorer ex-mining township of Mount Morgan lies to the west – each taking just under 45 minutes to reach.

The Program receives its funding from the State Government of Queensland, through the Department of Communities, Child Safety and Disability Services. As such, the Program is required to meet the Quality Standards provision of that department, and has done so since the Standards were introduced in 2008. CCA does provide detailed updates of its efforts on an annual basis to the Department. CCA is unusual in that it is the only Citizen Advocacy Program funded by the Queensland State Government (though another federally funded Program operates on the Sunshine Coast).

There is a Management Committee currently consisting of six members from varied human service, business, professional, and parental backgrounds who oversee the Program. They meet monthly, as does the Key Office Activities Sub-Committee,

and attend to the various items of business and oversee all aspects of the Program's operation.

The Program's Coordinator is Ewan Filmer, who has extensive background working in local government and the local university, as well as associations with a P&C of a local special school and a major community church.

Ewan has been with the Program for 3.5 years having taken over the position from Matthew Spur, who was Coordinator for just 12 months, and was unable to finalise the establishment of any matches during his tenure. This put Ewan, as the current Coordinator under some pressure to make new matches, but to also investigate the status of past matches, which has been a large body of work.

Additionally, there has been a rapid turnover in the leadership of the PProgram's Committee of Management over the current period, though the present Committee President (Jenny Smith) has brought refreshing stability and much Citizen Advocacy knowledge to the position.

Helpful to the present task has been the opportunity in early 2016 for Ewan to complete, as a team member, a CAPE with the North Quabbin Citizen Advocacy Program, as well as visiting local and state Citizen Advocacy offices across parts of USA. This has afforded him and the PProgram an appreciation of the preparation needed to conduct a CAPE.

In consultation with the Committee and the Department, it was determined that the number of matches that could be made *and* supported by one Coordinator *should* be 34. The Program has worked hard to conduct an Internal Relationship Review and develop a resultant recruitment plan that would allow it to extend the number of matches from 22 to 34 by May 2017: 12 new matches in the next six months.

These background issues feature considerably in the pattern of work leading up to the CAPE.

1.4 The Process of the Evaluation

The purpose of the evaluation is to provide the Program with clear answers with respect to three questions:

1. Is it a Citizen Advocacy Program?
2. Is it effective?
3. Is it viable?

After an overview of CAPE and a discussion of the Programs perceived strengths and challenges for the future, held on Sunday 6th November, the team gathered core information concerning the Program, and the work of the office and its support by the management committee.

Structured interviews were held over 2.5 days with:

- the Coordinator (over 9 hours), plus Amanda, as Administration Officer;
- six Committee Members;
- Met and/or learned of 22 matches;
- One crisis advocate and one advocate associate;
- A funder representative;
- Review of Program documentation including committee minutes, relationship files, newsletters, promotional materials, orientation resources, annual reports and previous CAPE reports.

The verbal feedback was provided late on Thursday 10th November, 2016 after the team had assessed all the collected evidence against the CAPE ratings and extracted the major themes of the evaluation.

2. Findings

2.1 Response to the Three Key CAPE Questions

Having reviewed all the evidence, analysed it against the 36 ratings of CAPE, the team can declare that:

1. Is CCA a Citizen Advocacy Program? Yes, CCA is Citizen Advocacy, but does require some safeguards against connections to formal services;
2. Is CCA effective? Yes, this Program is effective and it is making matches but there will be significant comments to add to the precision in the Program's matching;
3. Is the CCA Program viable? (Can it thrive and survive?) Yes, the Program has achieved a relative stability but there does remain a precariousness beyond 2019 and issues about the Committee of Management's capacity to continue to support the Program into the future.

We now want to expand these issues with the intention of strengthening the Program's good efforts in making many good matches.

2.2 Strengths of Capricorn Citizen Advocacy:

All activities, especially when conducted as part of a collective enterprise, can be enacted without a full realization of the rationales behind a practice. Many things may continue to be done without a full appreciation of reasons associated with such actions. This is true for positive actions and well as not so positive, though hurtful actions often *need* the existence of unconsciousness and denial to provide an illusion of benevolence and virtue.

In this instance, the team wishes to mention several strengths so that efforts can be made to preserve them against the natural tendency towards entropy (decay) and to even increase their worthiness and value to the Program.

2.2.1 Ewan, as a new Coordinator, has been successful in making matches

Many new Coordinators, especially when lacking guidance from a board, will pursue activities more aligned to their own identity and interests, often taking a Program in directions at odds with what Citizen Advocacy stands for and seeks. Ewan has not done this. Instead, he has pieced together a response as best able especially given some fragmented support and training provided from various sources. This does not mean that everything undertaken by Ewan in this period was perfect, only that his direction remained towards making many good matches. That focus will need to be maintained into the future given the possibility for funders to distort or even remove the existence of Citizen Advocacy from the funding landscape. It would be of great advantage if consideration could be given to the Coordinator applying for membership of the Citizen Advocacy Study Group to further his development and precision in using the Citizen Advocacy Model effectively.

2.2.2 The strengths of Program

- A Key Office Activities sub-committee of the main Committee of Management has enabled a much greater level of supportive supervision to be provided to the Coordinator. It has enabled an effective reporting mechanism as well as mutual learning for all members which helps to organise the work of the office to much greater level of effectiveness.
- The production of a protégé recruitment plan based upon a complete review of all the relationships. This a significant achievement given the state of knowledge concerning the status previous matches;
- The restoration of the match history of the entire Program and a revised filing system with much learning emerging;
- The quality of many of the current matches;

- Good and supportive expertise within the Committee, including many community connections;
- Efficiently conducted meetings, though there may be some reduction in the detail of verbalised Coordinator reports especially given the role and function of the Key Office Activities Sub-committee. However, the Coordinator report should still be regarded as *the* central report to the Committee given the connection to the very mission of a Citizen Advocacy in making many good matches and not being pre-occupied with “non-programmatic” or essentially administrative activities;
- The Coordinator’s commitment to people and to hard work in using the Citizen Advocacy Model where he has done his best with great tenacity; sometimes with a support arrangement that was itself in disarray, as when Presidents were rapidly turning over;
- Amanda, the Program’s Administration Officer and Ewan are an effective team with a valuable mix of skills and experience;
- The Committee of Management have remained faithful stewards of the Program in not being seduced by funding uncertainties or distraction to find security in other pursuits and the resultant abandonment of protégés to a world of paid relationships.

3 Identified Challenges before the Program

All human activities have a tendency to lose focus, yet for reasons that few understand or even see.

It is a crucial feature of evaluations that many practices and their underlying assumptions get exposed so that practitioners, such as the Office (staff and board) in this case, can have effective influence over those things if they are make improvements and needed adjustments.

We know from the understanding provided by Social Role Valorization (SRV) that one can conceptualise a response to people existing in heightened vulnerability as being “load-lifting” and/or “strength-building”. This framework has considerable utility in most service contexts but has also provided the team a lens for considering a central feature contained within the Program broadly, but also within the Coordinator’s principal practice strategy.

‘Load-lifting’ is a metaphorical way of describing the removal of barriers and problems that people have or might encounter, on behalf of that person *by others*. This is usually a strategically useful way to lift concerns that the person themselves *is unable to lift for themselves*. ‘Strength-building’ on the other hand captures the

notion of strengthening the person's own abilities, assets and networks to become an agent able to meet their own needs.

Load-lifting implies things that must be done by others that could not now, nor sometimes ever, be carried out by the party at issue. Strength-building capitalises on available and existing strengths that can be 'lifted' which enable a party to accomplish actions for their own benefit. But applying load-lifting strategies when strength-building approaches could be available tends towards dependency and a weakening of a party's available potential – with resultant and often long-term detrimental effects. For instance, it is likely to lead to increasing *incapacity* as the party relies on others in ever increasing amounts, when *independence* and growth could have been available. Strength-building is typically more image enhancing to a party than is increasing dependency.

For helping parties too, the decision to load-lift or strength-build can be important for their own identity. Both can be viewed as doing something good for someone which often increases the value the helper holds towards the party they have assisted. (Doing bad things has a reverse effect). But, there can be for some people an increased feeling of wellbeing in doing something for a party rather than doing something that intrinsically strengthens that party's own abilities. That is, keeping someone dependent increases the feeling of 'being needed' that for some people can be very appealing to their own sense of identity and wellbeing. Thus, load-lifting can bring other agendas, not always associated with the best interests of the recipient party.

In Citizen Advocacy (as opposed to a direct serving), the emphasis is placed on the ability of citizen advocates to decide what should be pursued in the life of their protégé: load-lifting or strength-building. But the actions of the Office are always directed towards the strength-building ("potentiation" as Wolfensberger might say) of advocates, as load-lifting will likely see the actions of staff supplant advocate actions if and when they do things that could and should be done by the advocate. Such a practice has implications for the principle of "Clarity of Staff Function".

With that as background, we now want to make some observations regarding certain tendencies in the Program that can be illustrated with these metaphors in a way we hope will be compelling and useful to the Program to consider and review.

3.1 There is a pattern of 'load-lifting' rather than 'strength-building' in the Program

Patterns are usually not evident with just a few events, but with an increasing number of related events, patterns can emerge revealing underlying features useful

for analysis. Patterns may not be intended, but could signal an underlying orientation that can be unconscious to even those adhering to the pattern! Here is what the team found:

3.1.1 The Program receives many referrals from services and tends towards building connections and associations with those referring agencies.

Many referrals are accepted because of a general trust that anyone referring from such entities would be reliably reporting upon the needs of a (potential) protégé. An agency is assumed to have the necessary competency to make referrals; accurately assessing a potential protégé's need for advocacy and what it is that a potential advocate would need to do. The danger here is to divert [or transfer] responsibility for protégé recruitment to agencies (a kind of load-lifting to them) by accepting protégés *they* feel need an advocate which are not necessarily reasons consistent with that of a CA Program. (Please refer to Appendix 3, paper by Mitchel Peters addressing issues of accepting agency referral). Entering involvements with these parties further reinforces the notion that the Program is serving their interests by being available in accepting such referrals. However, such connections could adversely affect the quality and even perception of the Program and advocate independence should battles occur between advocates and these agencies.

3.1.2 Agreement to a match is reached with the advocate prior to the commencement of formal orientation.

Typically, in citizen advocacy practice, agreement is made with a potential advocate just to proceed to the next step: orientation. The present practice in this Office (not without a rationale) is to obtain a commitment from the potential advocate to the match before orientation has begun. This inherits the problem of the Office having to proceed with a match without continuing to assess the potential advocate's suitability for the match while engaged in orientation. Orientation efforts are never wasted if a potential advocate proves to be suitable in a general sense, although not suitable for a particular match. After all, that potential advocate might be suitable for another protégé in a different kind of match.

3.1.3 Orientation may be too full and quick to be effective.

A very large body of material is conveyed in just 1.5hrs, which leaves precious little time to cover individualised material associated with the

protégé that would likely stimulate interpersonal identification towards the protégé by the advocate, let alone providing time to reflect, internalise and question. No advocate the team spoke with could recall what the session covered. If orientation does not convey a sense of strengthening concepts, then advocates leave unstrengthened and more reliant on the Office to resolve unanticipated difficulties as they arise. This is even more true when strategies for handling predictable encounters with third parties or other potential barriers were not addressed in orientation, but come as a complete surprise to an advocate.

3.1.4 Match letters contain a great deal of detail, well beyond the usual or even practical expectations. The team examined the detail presented in match letters and their likely utility for new advocates. It seems that along with a great deal of “case-work type” information, the letters demonstrate how much detailed expertise the Office carries that is far beyond that of a new advocate. The letter alleviates the need for the advocate to trace information themselves, that would otherwise invest the advocate into the relationship; the Office (with the best of intentions) has done it for them. For sure, there are things the Office should provide in a match letter: clear statements about the protégé’s needs, preferences about the nature of the relationship they are entering and therefore clear ideas about the commencing role(s) of the advocate. A match letter should also serve to remind and reinforce advocate independence: that the advocate should be independent of agencies that provide services to the protégé; that the advocate is independent of the family of the protégé, where there is family involvement; and that the advocate is independent of, but supported by, the Citizen Advocacy office.

The current letter loses that clarity in a large sea of information, again because it is doing something for the advocate as opposed to strengthening the advocate for their role.

The team also learned that letters were not always absorbed or even read by some advocates and therefore seemed not to bring the practical benefits that were hoped for.

At the heart of the matter is the assumption that the advocate is having or will have a hard time, and it is the role of the Office to lift their load and make their role easier. While again, this comes from a good intention, the result is likely to weaken rather than strengthen identification between an advocate and protégé.

3.1.5 There is an emphasis on tasks to be performed rather than a role to be filled.

The match letter tries to detail everything knowable about a protégé. But it misses the essence of the relationship. In that sense, it fails to bring clarity; a starting point for the relationship. Rather, the letters tend to list a set of tasks which the advocate could have been left to devise once they understood their role, but who may now feel an obligation and reliance *to the Office* to fulfil. Some advocates expressed the desire to “not let Ewan down”.

3.1.6 Much work is done on behalf of the advocate as a substitute for follow-along and support

Because orientation is a list (and a big one) of topics that must be covered, it seemingly misses out on critical discussions pertaining to the protégé’s circumstances and of strategies the advocate might use in their commencing approach to an agency, especially one that has heavy control of a protégé’s life. Thus, in some instances, events have occurred that opposed the presence of an advocate, but were handled by the Office on behalf of the advocate. There are feasibly two questions this raises:

- 1) could the protégé’s circumstances be predicted and communicated in advance? and
- 2) could the advocate have been prepared to handle the situation themselves?

There are implications for how internal and external promotion are handled within orientation, support and follow-along and for avoiding the Office exceeding their legitimate areas of involvement in adhering to the principle of ‘Clarity of Staff Function’.

3.1.7 There is potential for some relationships to retreat into purely expressive modes.

There was a pattern in a few relationships where they had commenced in an instrumental/expressive mode, but were now conveyed as purely expressive. This was especially true where third parties in a protégé’s life had shaken a new advocate and where the Office responded directly with the third-party on behalf of the advocate². This has seemingly sent the message that the Office will handle issues of an instrumental (or at least third party) nature on the advocate’s behalf. It could also communicate

² There is of course a role for the office to play in setting the scene for a new advocate with third parties, whether they be an agency and/or family. But this is typically a pre-emptive strategy (referred to as “external promotion”) and often consists as merely a letter setting out the existence of the advocate as an independent voice, such that they are even outside the control of the Program.

that only the Office, with their knowledge, expertise and contacts (see 3.1.1) can handle such issues and that all that is left for an advocate is the relatively safe area of friendship with the protégé. While we are not suggesting that friendship isn't important and valid, it does reduce the kind of needs that an advocate is prepared to address, leaving the protégé without instrumental protection and/or the Office acting as a de-facto advocate when and if any instrumental issue arises.

Of importance is the preparedness for an advocate to act with spokespersonship and to be able to do so without any conflict of interest. If a Program's relationship with a third party seems close (perhaps because it accepted a referral and established a relationship), or because the Office may have already acted with spokespersonship on behalf of the match, then the advocate is left weakened regarding them fully assuming that role.

3.1.8 There are few advocate associates

Advocate associates assist advocates with expert knowledge, often of a technical nature so that advocates can act with confidence because of the strength-building such information provides. When there are few advocate associates available, the Office can be unduly drawn by necessity into assisting (load-lifting) directly on behalf of advocates. It will be crucial for advocate associates to realise that they are also not the advocates, but are there to resource the advocates and not take over that function.

All this misses the opportunity to build strength and capacity in advocates to solve and resolve issues that will likely arise in their relationship. Load-lifting weakens these matches in many ways and makes them increasingly dependent on the Office to intervene on their behalf. It also draws the Office into assuming roles that weakens rather than strengthens such matches.

3.1.9 Support and follow-along has been supplanted by direct Office action.

There is little the Program offers by way of systematic and regular follow-along and support which the team believes is somewhat due to the present emphasis on directly resolving match issues with third parties as mentioned above. This means some matches receive considerable involvement of the Office, while others receive very little. But regular follow-along and support has proven to be crucial in strengthening matches, especially beyond the initial period where advocate dedication is

still building and where independently initiated action and spokespersonship is yet to become well established.

3.2 There is a mix of responses to the needs of Office staff to perform their role

The Committee of Management has passed through a period of significant change involving the loss of members and the recruitment of suitable replacements. This always takes considerable energy and it is commendable that the Program has come through such a period with a reasonably stable and informed group of committee members.

Such periods can mean that the Committee make additional demands upon their staff, when the more balanced and long-term perspective is that the Committee exists to serve the interests of the Program through its staff. This means the Committee in time might see itself as ‘load-lifting and strength-building’ for the staff and not use the staff to be ‘load-lifting’ of its own interests.

For instance, there have been many expectations, as indicated in minutes, that the staff—and especially the Coordinator—fulfil many non-programmatic tasks rightly belonging to the Committee (perhaps assuming it had a full complement on members). Such tasks of course (like the work of the solar panels etc) takes the Coordinator away from the business of making and supporting matches – which is the core business of the Program for which the Coordinator is employed. As the Committee recruits other energised members (and we appreciate how hard that can be), it will become more feasible to undertake a strengthening or at least, less load-lifting expectation on the part of staff.

Of strength-building influence is the role played by the Key Office Activities Sub-Committee, as mentioned in the section on strengths (Section 2.2). The regular meetings provide considerable opportunity for reviewing the work that has been done, considering the work laying ahead and providing supportive feedback and strategizing to the Coordinator.

The Sub-Committee has worked hard in conducting a relationship review and using this to establish a new set of goals for the immediate period ahead. A plan offers guidance for protégé and advocate recruitment (though we note that the

plan lacks advocate types) and helps prevent reliance on third party referrals of protégés.

Of interest to the team were goals associated with recruiting children of various ages within the 0-18 period. In that sense, the plan emphasised ‘age’ as the only dimension to receive adjustment against the background of the review. All other dimensions, such as formality, reciprocity, instrumental/expressive, low, medium high demand, etc., were not considered in light of the current composition of matches. The team strongly suspects that 12 new matches by next May to be unrealistic and that such attempts to meet this requirement will likely lead to rushed and potentially unsuitable matches with adverse effects for all concerned but especially protégés.

Because of the singular emphasis on age, we would like to conclude the report with some cautionary comments pertaining to issues that arise when third party authorities exist in a protégé’s life (as they inevitably will if children are recruited into the Program) and what effect such prospects have for an effective advocacy relationship.

4. Potential Issues Arising When Third Parties carry Statutory Authority

We wish to make some comments that point to potential circumstances that predictably arise when a protégé’s life is controlled by a third party. We note that there are 4 protégés in the Program already that have authoritative third parties (usually a system or distant system representative/state guardian) influencing their lives in often very definite ways and with little right of appeal.

- 4.1 A relationship between an advocate and a protégé can only occur with the prior approval of the third-party authority, implying that a citizen advocacy office may have to form such an influential relationship as to potentially threaten the independence of the Program to act without such approval;
- 4.2 A third-party authority can force and insist on compliance and can abruptly end a relationship, with repercussions felt mostly or wholly on the protégé but also the advocate;
- 4.3 Freedom for the advocate to act in many, most or any direction can only occur with permission and approval of the third party. In other words, the relationship is not free;

- 4.4 The third party (eg; state guardian) may not personally know or understand or identify with the protégé. Thus, much like many advocacy relationships, the advocate's efforts may be consumed by having to convey such a central perspective to a guardian, only to have to repeat the exercise each time a change in personnel occurs;
- 4.5 Such matches require advocates of high competence and perseverance who have highly developed communication skills and a deep and enduring commitment to the protégé. They will also require a high level of moral and strategic support, such as with a knowledgeable advocate associate;
- 4.6 Indeed, recruitment of suitable advocates might need to start with recruiting the right advocate associate;
- 4.7 Much insight into protégé experiences and needs and their likely disturbed responses to such a disrupted social world will require careful consideration in preparing the advocate, even before the match is made;
- 4.8 Much foresight is needed to anticipate likely scenarios and develop adaptive responses, even though these may still prove unsuccessful (consider a "pre-mortem" approach as shown by the author Gary Klein);
- 4.9 Fallout for failure in these matches (perhaps due to some incident) could have far reaching implications, such as prohibiting further contact with any citizen advocate or threatened closure of the Program;
- 4.10 Demands of these relationships could swamp a Program and lead to the neglect of other relationships. This tendency increases as the number and proportion of this type of relationship increases;
- 4.11 There is potential and possibly even a necessity for the Program to build ties with third-party authorities to get any foot in the door that would permit CA involvement. But such ties also carry the danger that the Program could get co-opted into providing a quasi-authority approved mediation and control on behalf of the third-party, threatening the independence of the Program and the advocate's ability to operate independently (as they are to work under the authority of the Program acting as a proxy for the third-party authority);
- 4.12 As advocates are not free to act, they may be offered tokens – a symbolic sense of freedom providing an illusion of independence and of freedom and liberty that is in the end, not true. Examples are the token gesture of "present-teeism" (similar to absenteeism, but with the intention of allowing the advocate to symbolically participate in certain activities, such as attending a meeting, whilst substantively remaining "absent" from meaningful engagement), or being the "eyes and ears" of the guardian;

- 4.13** Possibly the only way to defeat the level of system control is for the advocate to become (if permitted) the primary carer, as with adoption, otherwise it is very likely they will eventually be spat out or only permitted to continue as a quasi-functionary of the system.

These points are not intended to completely dissuade the Program from its efforts to recruit children. But these comments are meant to provide sufficient cautioning for the absolute need for carefulness and diligence in pursuing such avenues and for weighing the likely implications for failure: to perhaps go where ‘angels fear to tread’.

5. What lies before Capricorn Citizen Advocacy?

At the time of writing this report, the most massive change in system arrangements for human services to disabled people is taking place. Decisions about the future of advocacy are still to be announced with no one quite certain as to their future. Some Programs already have begun to seek funding for functions performed by indirect services, such as planning.

There are also serious discussions across three states for the introduction of legislation permitting euthanasia for people experiencing pain and suffering; something that concerns a great many people with a disability. Such developments will necessitate the Program being clear in its response to circumstances that could interpret the lives of people with disability as being futile, implying an unacceptable and unending form of suffering deserving of euthanasia.

Uncertainty can be guaranteed, and to some extent, future security is dependent on the ability to be able to seize opportunities as they arise *that do not alter one’s essential mission*.

But how might this be done? Some ideas are floating about: widening the array of protégé’s in the Program that might attract distinct and new funding sources: mental health, Aboriginal or refugee sources; ramping up crisis advocacy capacity to attract funding for short-term advocacy, while maintaining and expanding long-term relationships in the background. In that context, the team noted that the Program has recruited as protégés, a number of people whose disability is not primarily of an intellectual nature, or who have multiple disabilities. Recruiting protégés who have different identities or disabilities can be fraught with challenges. To that end, we encourage Program staff and the Committee of Management to familiarise

themselves with some such issues in the article (Appendix 4) by Wolf Wolfensberger, the founder of Citizen Advocacy.

6. Conclusion

These and other options lie before all of us. Our ability to remain agile while remaining true to our Principles while recognising that systems everywhere seek to control people's lives and by necessity produce dependency and wounding. Citizen Advocacy must maintain its commitment to devalued people if it is to have any viable future, else it becomes another functionary of the service system, dedicated to promoting its own interests and disguising its actions in a myriad of deceptive and self-deceiving ways.

We express our thanks to you for asking us to conduct the evaluation and applaud you for doing so at such a time of uncertainty. We hope our observations will be helpful to you as you press forward to make your Program as strong, resilient and strength-building as possible in all the lives you touch.

John Armstrong

On behalf of the CAPE Team 2016

Appendix One: CAPE Checklist

CAPE CHECKLIST

CAPRICORN CITIZEN ADVOCACY

DATE: August 9-13, 2010

Advocate independence

R111 Unpaid Roles Level 4

R11211 Internal promotion Level 3

R11212 External promotion Level 2

R1122 Advocate practice Level 3

Program independence

R1211 CA Program separation from direct service Level 2

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 2

Protégé characteristics

R1411 Protégé age Level 3

R1412 Protégé capacity for relationship reciprocity Level 3

R1413 Protégé need for spokespersonship to defend human and
legal rights Level 3

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 2

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 4
<i>Citizen Advocacy office effectiveness</i>	
R21 Vision and creativity of protégé recruitment	Level 3
R22 Advocacy recruitment	Level 2
R23 Advocate orientation	Level 3
R24 Advocate - protégé matching	Level 1
R25 Follow up and support to relationships	Level 1
R26 Ongoing training	Level 3
R27 Advocate associates emphasis	Level 2
R28 Balance of key CA office activities	Level 2
R29 Encouragement of advocate involvement with voluntary associations (insufficient evidence)	Level 1
R210 Sufficiency of CA office staff	Level 2
<i>Community leadership involvement</i>	
R311 Feasible governance and guidance structures	Level 2
R312 Composition of governance and guidance bodies	Level 3
R313 Level of leadership involvement	Level 4
<i>Funding related issues</i>	
R321 Long term funding potential	Level 4
R322 Local funding participation	Level 1
R323 Program legitimisation	Level 4

Appendix Two: Members of the Team

Mitchel Peters (WA)

Mitchel is a former co-ordinator, and founding member, of Citizen Advocacy Eastern Suburbs. He has been involved in Citizen Advocacy for over 25 years. In addition to providing training to Citizen Advocacy Programs, Mitchel has participated in a number of evaluations using the CAPE tool, variously as team member, report writer, and team leader.

John Ferreirinho (WA)

John Ferreirinho's first introduction to Citizen Advocacy was through participation in training and orientation as a prospective Citizen Advocate in Perth in 1983. After taking up an offer of a teaching position at the Capricornia Institute of Advanced Education in Rockhampton later that year, he subsequently worked in the Public Sector in Perth. He then resumed University studies and research-related work in Physics in Perth and Canberra. More recently, John worked in the Vocational Education and Training sector in Western Australia. He is currently self-employed as a private tutor.

John re-joined the Program of Citizen Advocacy of WA (Inc) as a Citizen Advocate in 1991, continuing in that role until 2008. After an initial year on the Board of Management during the mid - 1990s, he re-joined the CAPW Board in 2009. Currently the CAPW Board Secretary, John's participation in the Capricorn CAPE is his first experience as a CAPE team member.

Deb Maio (NSW)

Deb Maio was introduced to Citizen Advocacy through an involvement with a Support Group associated with advocacy for people within a NSW Government run institution in Western Sydney. It was here she was provided training by Michael Kendrick and Lisa Stelc in the principles behind Citizen Advocacy and SRV based upon the writings and teachings of Wolf Wolfensberger.

In 2005 Deb became Coordinator at CA Western Sydney and in 2014 took up her current part-time position as Citizen Advocacy Coordinator at CA Ryde Hunters Hill, now known as Side-by-Side Advocacy.

Paula Fisher (South Australia)

Paula Fisher has been involved with Citizen Advocacy South Australia Inc. since the start of January 2016. By being in the right place at the right time, became part of the team as a Coordinator.

Previously to this she was employed as a Support Worker for a Government Service provider for over 8 years as well as travelling around Australia for over 10 years taking on a wide range of employment opportunities that has been the major player in being able to relate to a diverse range of people from differing geographical locations.

She began her journey with Citizen Advocacy by seeking out advocacy organisations that could be able to help with some issues that the people she was working with were facing. Citizen Advocacy South Australia seemed to be the only place that focused heavily on creating and building genuine, freely given relationships.

In her short time as a Coordinator she has learnt a great deal of patience and a more in depth understanding of life, society and Social Role Valorisation, what Citizen Advocacy is heavily based on.

She is a self proclaimed “why” woman and will never take any answer as gospel without intense interrogation and research in to the subject. Being the one of the newest members of the Citizen Advocacy movement she is eager to continue her learning and will take every opportunity to refine her skills.

Jules Garland (New Zealand)

Jules Garland first encountered Citizen Advocacy when she attended the SRV Conference in Canberra in 2011. Her son has a disability and she feels a strong commitment to the principles of SRV. Jules has a background in research and policy in public health. She has since participated in PASSING training, joined an SRV study group with John Armstrong and attended the SRV conference in Providence in 2015. Jules became a Board member of Citizen Advocacy Auckland in 2014 and in January 2016 resigned from the Board when she took on the role of part time Coordinator of Citizen Advocacy Auckland. This is Jules's first experience as a CAPE team member.

John Armstrong (Vic), Team Leader and Report Writer

John is a self-employed human services consultant and Social Role Valorization trainer who has also served as a citizen advocacy Board Member (Sunbury Program), Chairperson, and Advocate, and is now the Secretary of the Citizen Advocacy Trust of Australia. He has led many CAPE evaluations within Australia, NZ and USA. He has been used by many Programs to conduct board, Coordinator and advocate training sessions over many years.

Appendix Three: Article by Mitchel Peters

SOME IMPLICATIONS OF ASKING FOR, AND/OR RESPONDING TO, REFERRALS FOR PEOPLE WITH DISABILITIES TO BE MATCHED WITH ADVOCATES

Mitchel Peters

When a Citizen Advocacy (CA) office acts on a referral, it is presumably based on the belief of the veracity and validity of the referral. Indeed, given that Citizen Advocacy office staff are not omniscient, a referral may draw their attention to a person whose situation is hitherto unknown to—and may never otherwise be known by—the CA office, and which compels a response. For example, a concerned staff member of a service-providing agency may discreetly contact the Citizen Advocacy office with first-hand or inside knowledge about instances of ongoing abuse inflicted by fellow workers on one or more clients of that agency. Clearly, referrals of this kind—by informers, particularly from within service settings that are not easily accessible to the CA office—can be one important means of identifying and reaching people in need of advocacy.

At the same time, however, it must be acknowledged that primarily and indiscriminately relying on referrals to recruit protégés will yield some undesirable outcomes, including the following.

1. Habitually seeking or responding to referrals may mean that, on balance, people most in need of advocacy are unlikely to come to the attention of the Citizen Advocacy office for at least three reasons.

1a. Typically, some of the most vulnerable people are isolated (e.g., they may live in highly restrictive environments), or otherwise have few allies or resources to bring their situation to the notice of the CA office.

1b. When referrals are made, any bias or vested interests of the referring party is apt to influence its rationales for nominating “who” and “why”—with the possible consequence that those in genuine or serious need of advocacy will be overlooked. For instance, staff of a service-providing agency are more likely to refer clients who have expressive needs, or instrumental needs of a non-spokesmanship nature, rather than those whose situation may necessitate vigorous advocacy against individual

staff members and/or the agency. Or, agency referrals may reflect staff judgements about clients who are most “deserving,” whereas it is conceivable that those not referred—perhaps because they are deemed to be less “loveable”—are in greater need of a citizen advocate.

1c. Reflexively accepting referrals of all kinds can displace, even imperceptibly, a more pro-active approach by the CA office of seeking out people with the most serious or significant needs.

2. By definition, referrals inherently suggest reasons why a particular person should be matched with an advocate. Thus, the indiscriminate acceptance of referrals has the potential of usurping the role of the Citizen Advocacy office in independently identifying the needs of the person referred.

3. Seeking or taking a large number of referrals will result in the compilation of an ever-increasing waiting list that, in turn, can have unfortunate consequences, given the numerically small-scale response of most CA offices.

3a. For some people, considerable time may elapse before the Citizen Advocacy office can even begin to recruit an advocate on their behalf. Furthermore, by the time an advocate has been found for a person who has been waiting to be matched, the reasons for the referral (if those reasons were valid in the first place) may have assumed greater or lesser gravity. For example, in the intervening period, the person’s situation could have worsened irrevocably.

3b. Some people on a seemingly interminable waiting list may never be matched, contrary to the explicit or oblique promise made to them by the CA office by virtue of accepting the referral. In this way, the Citizen Advocacy office can inadvertently compound the pre-existing wound of rejection, which characteristically leaves indelible bruise marks on so many people with disabilities.

4. Sometimes, behind the façade of concern for the interests of the person referred, there may be additional or other reasons for the referral, such as the following.

4a. The referring party may simply want to absolve itself of the legitimate responsibility to take further action, which is actually within its capacity or mandate. For instance, a service-providing agency may refer its clients to be matched with advocates who are expected to undertake actions that are really within the ambit of the role and responsibility of agency staff.

4b. Referrals can be a means to control the character and direction of the CA office (“Let’s keep them busy arranging friendships for our clients, so that we aren’t bothered with any real advocacy”).

4c. A constant stream of referrals may mask the ulterior motive of incapacitating the operation of the Citizen Advocacy office by placing inordinate demands on its relatively limited resources.

5. Acceptance of referrals will mean that, in terms of the composition of matches established by the CA office, there is unlikely to be a wide range of protégé characteristics and needs, and a corresponding diversity of advocacy roles, as explicated in the Balanced Orientation to Protégé Needs principle in the CAPE (Standards for Citizen Advocacy Program Evaluation) manual.

6. Related to 4b and 5 is that if a significant portion of referrals is about “requesting a friend for so-and-so,” then the consequent matching practices of the CA office will transform its identity to that of a buddy-like Program.

7. Even though referrals may emanate from a range of sources, if the Citizen Advocacy office exclusively or mostly responds to those from service-providing agencies, it is apt to invite the perception that the office is merely an adjunct to the service system, rather than be seen as an independent entity.

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Appendix Four: Some Thoughts on Citizen Advocacy Offices Recruiting Advocates for the Mentally Disordered or for Multiple Needy Classes by Dr Wolf Wolfensberger