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## Acknowledgments

Welcome to *Change is Inevitable, but Growth is Optional* . . . This title is central to the Independent Living movement and to understanding the goal of this manual, which is to assist persons with disabilities learn the skills necessary to enable them to become effective self-advocates. Ultimately, what is most important is that persons with disabilities make their own choices and act on these choices in the community.

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What is unique about this manual is that each of the modules can be offered independently or in combination as a whole series. Each module interconnects in ways that not only inform, but also enable participants to move toward more challenging advocacy situations. This flexibility also allows facilitators to accommodate the varying needs of participants.

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## *Self-Advocacy . . .*

Imagine being out on the ocean as master of your own ship. The trim-tab is a small adjustable flap on a ship's rudder and by manoeuvring it, one person can easily turn the entire ship. One person can make a difference.

“I think you'll make a good advocate,” said he. “You have the two necessities, ability and imagination. A good advocate is his client's alter ego; his task is to say what his client would say for himself if he had the knowledge and the power. Ability goes hand in hand with the knowledge; the power is dependent upon imagination. But when I say imagination I mean the capacity to see all sides of a subject and weigh all possibilities; I don't mean fantasy and poetry and moonshine; imagination is a good horse to carry you over the ground, not a flying carpet to set you free from probability.”

Robertson Davies: *The Manticore*<sup>1</sup>

No matter how complex the disability, the person must have the opportunity to share his or her own desires, interests, preferences, and directions. Always promote self-advocacy as the preferred option.

John Lord, 1988.

Labels belong on jars . . . not on people.

Dona Buckberger, 1998

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<sup>1</sup> A manticore is a legendary animal with the head of a man, the body of a lion, and the tail of a scorpion. This combination suggests knowledge, courage, and action: 3 essential qualities for effective self-advocacy.

## Introduction

This *SELF-ADVOCACY MANUAL* is a tool for facilitators and volunteers to assist persons with disabilities learn the skills necessary to become effective self-advocates. It is geared toward persons with disabilities who are at a level where they are prepared to make changes in their lives, but need the encouragement and support of their peers to explore barriers they are encountering. There is an assumption of a certain level of independence and autonomy in order for this series to be effective. If consumers are at the stage where they are ready to leave an institution, for example, they might benefit from another series, such as *Building Equal Partnerships*,<sup>2</sup> before moving into the exercises in this manual. It is essential that a comprehensive needs assessment of each member of the group take place to ensure that the consumer is not only willing to take part in the workshops, but also prepared to do the degree of self-exploration the exercises involve. The consumer must have the choice of which route to take, because the aim of each module is not to disempower those who may not be ready for this series.

This manual is divided into two main sections: The first section is directed toward the facilitator. It describes the history and development of the Independent Living Movement. While some of the facilitators may be familiar with the Independent Living approach to group facilitation, others may be unaware of the IL philosophy. This section can serve as a guide on how to enable the consumers to articulate exactly their expectations from the workshop series. The second section is divided

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<sup>2</sup> Contact CAILC, Ottawa for resources

into eight modules on building self advocacy. These modules connect in ways that not only inform the participants on aspects of self-advocacy, but also enable participants to improve communication skills, increase assertiveness skills, and prepare for and make independent decisions on issues that affect their lives in the community. Depending on the needs assessment/requirements of the participants, the facilitator can either shift from one module to the next in a linear fashion, or omit one or more of the early modules as necessary. Time spent on each module will depend on the needs and energy level of the participants.

Again, what is most important is that persons with disabilities make their own choices and act on these choices in the community. Independent Living Resource Centres (ILRC) and other community-based organizations can enable this process by offering Self-Advocacy Workshops based on the Independent Living philosophy.

**Section One:**  
**Background on the Independent Living Movement and the Need for Self-  
Advocacy**

An Independent Living Resource Centre is a non-profit community resource centre designed to support persons with disabilities in their efforts to live independently. Canada's ILRCs share a common mission: to promote and facilitate the gradual assumption by citizens with disabilities of responsibility for developing and managing community resources (Kowbuz, 1993, 1-4).

The Independent Living Movement was launched in the United States in the early 1970s. The first Independent Living Centre was founded in Berkeley, California following an attempt to integrate students with disabilities into the community; it was managed mainly by persons with disabilities. Today, there are more than two hundred centres promoting the Independent Living philosophy across the United States and more than twenty-two centres across Canada. In Canada, the IL centres are consumer run and driven in that they deliver services requested by persons with disabilities in each centre's community. As a result, each centre offers different or varying services from one another.

In Canada, the first centre opened its doors in Kitchener, Waterloo, Ontario in 1982. The Canadian movement differs from the US movement in that its development was shaped by the consumers' advocacy movement, particularly its emphasis on personal empowerment.

From the consumers' advocacy movement, the Independent Living philosophy prioritizes the notion of the consumer's advantage in the economic system where the consumer is always right (CAILC, 1995, 9). The Independent Living movement applies this theory to rehabilitation asserting that the person with a disability is best able to determine which services might meet his or her needs. This runs contrary to the traditional medical model in which service providers, such as rehabilitation specialists and physiotherapists, decide on the technical and human aids required to meet the needs of the person with a disability in order to maintain his or her independence. However, according to the Independent Living philosophy, **as a consumer, the person with a disability has a right to choose rather than passively receive a service.**

Returning the power to the consumer is not an easy task, especially when the institution has a history and a reputation for knowing what is best for the "patient" or "client." Self-Help Groups, Empowerment Workshops, and Self-Advocacy Workshops are intervention strategies that enhance services offered by other agencies; they "enable persons with disabilities to exercise a degree of control over their lives and over the services they use. **They place power back into the consumers' hands** by giving them awareness and knowledge" (Desfossés, 1993, 8).

In a similar way, the demedicalization movement seeks to involve the individual in his or her health care. The Independent Living movement agrees that, "in most cases, medical involvement is unnecessary and unproductive" (Desfossés, 1993, 8-9). The view that the doctor is always right assumes an expertise that dismisses the requirements of the consumer. It presupposes the consumer as "sick" or debilitated.

As such, the consumer is dependent on the service providers for a “cure” and becomes the cooperative patient. The IL movement

rejects the behavioural stereotypes created by the roles of patient and person with a disability. The movement asserts that persons with disabilities do not want to trade their family, professional, and civic responsibilities for a return to childhood. It is this ‘trade off’ which prevents a person with a disability from being integrated into community life and becoming a fully-fledged person. (Desfossés, 1993, 10)

Deinstitutionalization and integration into the community work against the dependency effects of prolonged institutionalized care. According to the Independent Living philosophy, “normalization includes the dignity of risk, [and hence] the possibility of failure” (Desfossés, 1993, 10). The person with a disability is ultimately responsible for his or her life.

The IL model emphasizes environmental barriers that impair the successful integration of the person with a disability into the community. It advocates consultation, protection of rights, support from self-help peer groups, consumer action based on information, and elimination of architectural barriers and social attitudes: the concept of Independent Living (CAILC, 1995, 16-17).

**Self-Advocacy, as outlined in this manual, adheres to the principles of the IL philosophy.**

## Section Two

### Module One: Needs Assessment

#### **Key Considerations:**

In developing a self-advocacy workshop for persons with cross disabilities<sup>3</sup>, it is important to cultivate group cohesion, which allows participants to connect to one another in ways that foster trust and respect. As part of the initial contact or opening interview with the consumer, the facilitator should inform the potential participant of the Independent Living philosophy and remind him or her that this is the central focus of the series. When consumers are aware of their ability to choose from the onset, they can articulate their own expectations and dictate their own pace as they begin each module. This is also the time to record any physical accommodations that need to be in place before the first group. There may be sensitivity issues, such as allergies to perfume or other products that should be relayed to the other participants. This is the time to make sure that the intended physical space is large enough to accommodate wheelchairs and scooters; the location of plug outlets for tape recorders may also need checking out.

The facilitator should be mindful of not putting his or her expectations for the group onto each participant. Each participant will inevitably learn new information, but what the participant chooses to do with that information is just that--the choice of that participant. The facilitator must take every opportunity to encourage respect

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<sup>3</sup> A cross disability group consists of persons with various disabilities, such as a person with a visual impairment, a person with a history of mental illness, and a person who has cerebral palsy.

for each other's diversities and differences. The group process can be a useful tool for illustrating the equalization of power amongst the participants.

The facilitator and his or her assistant should:

- ▶ Draw on the unique contributions of each participant
- ▶ Be aware of the energy level of the participants at all times
- ▶ Ensure that housekeeping issues such as attendant care, physical access, physical space, washroom accessibility, noise, lighting, room temperature, sign language interpreters, tape recorders, large print handouts and refreshments have been attended to in advance of the first group
- ▶ Start out by dividing the large group into groups of two participants when working in small groups in order to provide a safe place for participants who have difficulty communicating verbally, either due to their disability or social unease
- ▶ Use role play and small group work to enhance sessions: practice of lessons learned within the group increases the probability of the participants taking lessons learned outside of the group
- ▶ Spend time observing individual participants' behaviour in the small groups to draw on individual needs that can be addressed through role play in other sessions (without drawing attention to the participant)
- ▶ Allow for extra time when planning material: revision and evaluation periods are better than cramming in information, especially when the participant may be preoccupied with losing his or her ride home
- ▶ Make yourself available to direct the participants to resources in the community
- ▶ Be ready to meet the participants on an individual basis if needed

- ▶ Remember that humour is an essential component in a learning environment

**Note to Facilitators:**

This manual contains a collection of “Theory Boxes” in each module. These Theory Boxes contain the key points that participants should understand. There are also sample scenarios and other information “Boxes” for your use as required. Participants’ needs will vary. In some modules, one or two exercises may suffice, while in other modules, it may be necessary to complete all the exercises. Again, the pace and choice are dependent on the consumers’ needs. Finally, you may want to have various information “Boxes” copied onto overheads, put in large print and/or on disc or tape so that group members do not feel any urgency to write everything down. The handouts could serve as a useful tool for those with memory problems. In addition, participants may want to review the material after the series has been completed, which can be very self-affirming. Bearing this in mind, you may want to provide each participant with a handy file folder, sheets of paper and dividers.

## Facilitator's Check List

The facilitator and his or her assistant must:

- ▶ Ensure that housekeeping issues such as attendant care, physical access, physical space, noise, lighting, room temperature, sign language interpreters, tape recorders, spare tapes, large print handouts, refreshments, and access to washrooms have been attended to in advance of the first group
- ▶ Draw on the unique contributions of each participant
- ▶ Be aware of the energy level of participants at all times
- ▶ Schedule breaks
- ▶ Start out by dividing the large group into groups of two when working in small groups to provide a safe place for participants who have difficulty communicating verbally, either due to their disability or social unease
- ▶ Use role play and small group work to enhance sessions
- ▶ Spend time observing participants' behaviour in the small groups to draw on individual needs that can be addressed through role play in other sessions (without drawing attention to the participant)
- ▶ Allow for extra time when planning material: revision and evaluation of a session are better than cramming in information at the end of a session, especially when a participant may be preoccupied with losing a ride home
- ▶ Be sensitive to participant responses to material and make yourself available to direct participants to resources in the community
- ▶ Be ready to meet with participants on an individual basis if needed
- ▶ Remember that humour is an essential component in a learning environment



## Understanding Groups

### Goals:

- ▶ To get to know each other
- ▶ To develop a set of *Group Rules*
- ▶ To discuss participants needs and expectations
- ▶ To understand how we learn from group experience
- ▶ To learn how to accommodate one another
- ▶ To become familiar with the Independent Living philosophy

### Rationale:

This is a good time for the facilitator and volunteer/assistant to outline the contents of each workshop and to get some feedback on what the participants' concerns and expectations are for the workshop. It is also important to become aware of the learning approaches/needs of various participants in order to incorporate these approaches into the sessions. For example, some participants will learn by writing information down, but others may want handouts or tapes so that they can listen and observe more in the session.

### Tools:

Flipchart, markers, pens, paper, scissors, basket for pieces of paper.

### Method:

#### Warm Up:

Start the session off by inviting participants to share their name with the group and a color which best describes their personality. The facilitator and his or her

assistant may want to start. Try and encourage similarity as well as differences.

**Examples:**

- I. My name is Jim and I like the colour red. Jim might be a people person and like taking risks.
- II. My name is Bev and I like the colour lavender. Bev might not like taking risks. She may be the type of person that likes to keep everybody happy.

**Exercise 1**

Inform the participants that the group should develop some guidelines to meet the needs of the participants. Overall, each participant will only get out of the workshop what he or she is prepared to put into it. Ask each participant what he or she values the most in a sharing environment. The facilitator will list these points on the flipchart to construct a list of *Group Rules*. Refer to the Theory Box for some rules the group may want to consider.

## Theory Box: Group Rules

- i. **Confidentiality:** What is said in the group stays in the group;
- ii. **Commitment:** Do the participants want to sign a contract or make a verbal agreement? Should they let the group know a week in advance if they have to work or go out of town? How will they catch up on what is missed? If they want to drop out, should they discuss this with the rest of the group before leaving?
- iii. **Guests:** Should participants bring in friends or family members because they feel comfortable having someone they know with them? Should the attendant be the same every group and should he or she be expected to maintain confidentiality as well? Does the same rule apply to the sign language interpreter?
- iv. **Respect for each others' feelings and ideas;**
- v. **There is no such thing as a stupid question or a stupid answer;**
- vi. **No verbal put-downs;**
- vii. **No interruptions when someone else is speaking;**
- viii. **Equal time for all members;**
- ix. **Time of start and finish of the group;**
- x. **Breaks;**
- xi. **Smoking;**
- xii. **Any allergies, such as perfumes we need to be sensitive to.**



### Consideration:

Some groups pass around a piece of paper to have participants list their name and

phone number for further contact. Any participant who wants to call another participant in between sessions is then able to do so. As the participants are in the workshop to develop self-advocacy skills, they may feel, at this stage, unwilling to share such personal information with someone they do not know, but they may sign the sheet anyway. It works to give permission to the group members to approach each other with requests to call each other outside of the sessions if and when they feel comfortable enough to do so. Some may want to keep in contact once the workshop has ended.

**The facilitator should be sensitive to the type of disability and cognitive level of each of the participants as the members divide into small groups.** It is not advisable to put everyone in the same group on every occasion. Participants need to become sensitive to others' needs and methods of communication.

## **Exercise 2**

Hand out pieces of paper to the participants. Have each of them write down the worst and the best thing that can happen to them if they attend this workshop until its completion. Have them fold the paper and place it in the basket. Ask each participant to pick out a piece of paper from the basket and read the information aloud to the group. Acknowledge any fears the participants may have about being in the group, but put more emphasis on problem solving. List the worst and the best things that can happen on the flipchart. Ask for group feedback on how to eliminate the worst that can happen. Remind participants of the IL philosophy, that some group members may choose their degree of involvement in each scenario.

## **Example:**

- ✓ Can I [facilitator] have your permission to invite you to contribute to the group?
- ✓ Will you promise to tell me if something is uncomfortable for you to answer?
- ✓ Can we avoid “you” messages or blaming phrases like “you shouldn’t say that?” Discuss framing responses in the form of “I” messages such as “I feel that under the same circumstances, I would act differently . . .”

The facilitator should make him or her self available after each session or by appointment in case a participant wants to discuss any confidential material that may arise as a result of any part of any segment or module.

### **Exercise 3**

Divide the participants into pairs. Be sensitive to the physical needs and gender of some of the participants in doing this. Have each person introduce him or her self to his or her partner and describe a hobby, an accomplishment, or a skill that he or she possesses. After fifteen minutes, invite each person to introduce his or her partner to the large group. **The facilitator may want to circulate among the small groups to make sure that each individual is able to recognize his or her strengths, whether in the area of pets, people, crafts, or music.**

### **Discussion:**

#### **Questions to Consider:**

- ▶ What can we learn from being in a trusting environment?
- ▶ What can we expect from the facilitators?

- ▶ What can we expect from ourselves?
- ▶ What barriers can we think of that exist in our everyday life that effect our physical, psychological, and attitude toward others/ourselves?
- ▶ What if I choose not to participate in an exercise that everybody else is willing to participate in?
- ▶ How can we be sensitive to others' needs? Are there non verbal as well as verbal ways of sharing information with each other that we have observed during this exercise? What about body language or eye movement?

**Evaluation:**

Inform the group that they have been able to work together at sharing information, prioritizing, and problem solving. Ask them how they feel about this? Recognize that each member is unique and has some positive attributes going into the series. Guarantee each member that the group is designed for them and will move at a pace the group is comfortable with. End by pinning the final list of *Group Rules* to the notice board for future reference.

**Remember:**

There is no such thing as a self-made man. I've had much help and found that if you are willing to work, many people are willing to help you.

O. Wayne Rollins.

**Lead in to next module:**

Have participants think about a time when they have asked for assistance from someone/agency. Have them think about what they asked for and what the result was. This preparation will stimulate discussion on how various situations demand the use of various advocates. The facilitator may want to provide a straightforward example from his or her own personal experience. By doing this, the facilitator not only provides some basic information as food for thought, but also models the sharing of personal information in a group environment.

## Section Two

### Module Two: Self-Advocacy or Guiding your own Ship

#### **Key Considerations:**

Self-Advocacy is important to us, but it can be difficult to explain to others why it is so important. Today, it is possible to find almost anything labelled advocacy, including some highly traditional services. For example, placing an individual in an institution because his or her family feels the person is incapable of attending to his or her own needs might be called “institutional advocacy,” or submitting an article to the press on euthanasia might be called “public advocacy.” What is often omitted from examples such as these are the cooperation and collaboration of the individual[s] who requests the advocacy.

Very often individuals band together in order to advocate on an issue that affects every member of the group, such as physical accessibility or sexual discrimination, but this can be termed other-advocacy rather than self-advocacy.

The verb “to advocate” derives from the Latin *advocate*, which means “to call to, to summon.” It also means to give voice to. To advocate is simply to lend a voice in support of something to someone.

The most important form of advocacy is self advocacy. A person should have the opportunity to share his or her own desires, interests, preferences, and directions no matter how complex the disability . . . Always promote self-advocacy as the preferred option.

## Understanding Advocacy

### Goals:

- ▶ To be able to understand forms of advocacy and how they work
- ▶ To be able to understand the importance of self-advocacy

### Rationale:

Knowing the forms of advocacy helps persons with disabilities to understand the role various people, including service providers, may have or have had in their lives. It opens up a discussion on the input persons with disabilities may or may not have had in regard to various situations in their lives. Very often systemic (external) and personal barriers work together to prevent self-advocacy.

### Tools:

Flipchart, markers, paper, pens, scissors, and a basket to hold pieces of paper.

### Method:

#### Warm Up:

Ask participants to share their definition of an advocate/advocacy with the group. This can be a friend or family member who has acted on their behalf in a given situation; it can be an organization that supported them in a crisis; or it can be a time when one of the participants had to write a letter to advocate for him or her self. List the various forms of advocacy on the flip chart as they are addressed by the group. Refer to the Theory Box for forms of advocacy. Help the participants realize that there are various forms of advocacy and that one or more of these forms

may be called upon in a given situation. If participants are reluctant to share some examples, start by giving some of your own. Provide encouragement and support to participants as they share information. Be sensitive to those who may have had some negative experiences with various service agencies. Draw on common themes and ideas together as they relate to the participants.

**Example:**

**Personal Barriers to Effective Self-Advocacy**

- ✓ Low self-esteem
- ✓ Fear of retaliation
- ✓ Fear of rejection
- ✓ Lack of knowledge
- ✓ History of rejection

**Systemic Barriers to Effective Self-Advocacy**

- ✓ Attitude of others
- ✓ Lack of knowledge by others
- ✓ Time and policy constraints

Mary, who has a visual impairment, is enrolled in a graduate class that has been asked to complete a library research assignment. On the day that the assignment is due, Mary has nothing to give to the professor. Mary had been afraid to approach her classmates for help with this research in case they thought she was stupid or lazy. Her classmates had no idea that Mary, who is predominantly silent in class, needed any help. The professor has never had a student with a disability in his class before. Both personal and systemic barriers impact on the outcome of this scenario.

**Theory Box: Forms of Advocacy**



### **1. Peer Advocate:**

A one-to-one relationship between a capable volunteer with a disability and another person with a disability. The peer advocate supports the individual to make decisions and advocates for his or her rights or interests. Consider the peer support person with a brain injury in Carmella's story.

### **2. Citizen Advocate:**

A one-to-one relationship between a capable volunteer and a person who is disabled in which the volunteer advocates for the rights and interests of the other, and provides practical or emotional support. Consider the volunteer who drives the person with a disability to a social worker's office and attends the interview between the social worker and the person with a disability to advocate on his or her behalf.

### **3. Ombudsman:**

One who acts as an advocate for a person with a disability following the report of a grievance, by investigating, interceding, or initiating action on his or her behalf.

### **4. Legal Advocate:**

One who represents a person in a court of law when his or her rights are threatened or violated.

### **5. Case Manager:**

One who assists the individual in information, referral, and follow up services. Consider the social worker acting on behalf of his or her client.

### **6. Protective Services:**

A service mandated by legislation which provides guardianship, trusteeship, and

other advocacy services. Consider the trustee, initially appointed by the court to manage Carmella's financial affairs while she was in a coma.

**7. Legislative Advocacy:**

Using the legislative process to mandate change in the social system in order to secure the rights of persons with disabilities.

**8. Community Organization Advocacy:**

Using the community organization process to develop better communication among agencies serving persons with disabilities. Consider the IL centre in your area.

**9. Program Brokerage:**

Service development and program expansion that eliminate barriers which obstruct program development. Consider federally funded entrepreneurial program development.

**10. Consumer-Action Advocacy:**

Groups of parents or adults who have a disability that act as pressure groups to influence groups and advocates toward desired change. In Canada, Saskatchewan, consider the Saskatchewan Voice of People with Disabilities.

**11. Self-Advocate:**

Someone who has learned to speak for him or her self and to make his or her own decisions. That is you!

## **Discussion:**

Citizen and peer advocacy work toward community integration; they are:

- ▶ Persons who are approachable and close at hand
- ▶ Persons who can often identify with the same struggles as the consumer, or they can draw on life experiences to connect to the consumer
- ▶ Persons who have no vested (e.g., financial) interest in their endeavours to help the consumer
- ▶ Persons who tend to role model to both the consumers and in the community
- ▶ Persons who have the time to listen to the needs of the consumer
- ▶ Persons who are willing to develop a relationship with the consumer as an individual rather than, for example, as a case number

## **Citizen and Peer Advocacy: Drawbacks**

- ▶ Supply and demand: There may not be enough volunteers to go round
- ▶ Peer advocacy cannot replace other forms of advocacy. There are times when legal or other advocates are required
- ▶ They cannot substitute for the consumer

## **Exercise 1:**

Divide the participants up into groups (two or three per group can be the least threatening). Hand out copies of *Carmella's Story*. The facilitator may want to read Carmella's story aloud to the group and make sure everyone understands it before the small group work begins. Give each group a chance to work together to define and list the various forms of advocacy and how they could be used in this scenario. The facilitator and his or her assistant may want to circulate amongst the groups to ensure that the forms of advocacy are recognized. The facilitator poses

questions to the small groups to stimulate discussion rather than answer questions.

## **Discussion**

### **Questions for Consideration:**

- ▶ How many forms of advocacy can be found in this scenario?
- ▶ How much involvement has Carmella had in decision making?
- ▶ How have circumstances changed to enable Carmella to provide for herself?
- ▶ Should she control her own finances and provide for her children? Who should make that decision?
- ▶ Who should determine what Carmella's support needs are?

**While the ideal solution to Carmella's story is the return of her children on a permanent basis and having full control of her finances, it must be stressed that Carmella chose to remain under the care of the trustee and feels able to care for her children on a part time rather than a full time basis. The decisions are Carmella's to make. This supports the IL philosophy.**

## **Carmella's Story**

Carmella, aged twenty-nine, is a single parent of two children under seven years. One day, on an icy road, she loses control of her car and skids off the road into a ditch. She requires brain surgery, is in a coma for three months, and needs extensive rehabilitation. Today, seven years later, she walks with the aid of a tripod walker and has short term memory impairment.

When Carmella is in a coma, her family contact social services, who place the children in foster care. Her apartment is closed up and her belongings sold. She is moved out of the province of Alberta, away from her friends and the place where she works as a business manager, into a group home in Saskatoon, Saskatchewan. Her elderly mother resides in her own apartment in Saskatoon.

Carmella is appointed a trustee, a person whom she has never met, who is based in Regina, Saskatchewan.

Within a year, Carmella is moved into another group home, her trustee and social worker change, and she has lost contact with her children who have been separated into different foster homes--on at least two other occasions.

Carmella asked the local Brain Injury Association to help her move into her own apartment. The Salvation Army provided some furniture. She wanted to reestablish contact with her children and improve her financial resources. After talking things through with Joan, another brain injury survivor, Carmella chose to remain with her trustee, who provided Carmella with the finances to purchase a sofa bed, linen, and other household items. Joan and Carmella met with the social worker, who finally located the children. Carmella now has them visit and stay over on a regular basis.

**Evaluation:**

Review the session. Confirm the fact that participants were able to share ideas and/or experiences in defining and recognizing various forms of advocacy. Ask how they felt about working as a group--did this generate solutions that each participant might otherwise have not thought about on an independent basis? Ask the participants if one form of advocacy is more reliable than another? Is the individual the best person to identify his or her needs? What else have they learnt?

**Note to Facilitator:**

This story may stir up a lot of feelings among the participants. While the story might ring true for several group members, there is something that can be learnt from sharing with others in the safety of the group.

**Lead in to next module:**

As an introduction to the next module, ask the participants to consider why some persons with disabilities are reluctant to become self-advocates?

## Section Two

### Module Three: Why We are Reluctant to Act as Our own Self-Advocates

#### Key Considerations:

If someone pushes past me in a line up at the supermarket and I shout “hey, you mustn’t do that” when he or she leaves the store, am I being an advocate? Am I being assertive or aggressive? Am I communicating what I mean to say effectively? In some ways, I am being an advocate, but there is more to self-advocacy.

Self-Advocacy requires

- **Knowledge**
- **Courage**
- **Action**

More than anything else self-advocacy involves **risk**. Nothing worth fighting for comes without a price, whether emotional or material. Many persons with disabilities lack the knowledge and the courage to act on their own behalf.

Historically, persons with disabilities have been granted few, if any, rights. As a result, many persons with disabilities put others’ needs above their own. They may view assertive behaviour as aggressive behaviour, even selfish. They may have a genuine fear of reprisal. We often wish we had some of the qualities we see in others, feeling we can never attain them ourselves. We might make up reasons for not saying anything to the person who pushes past us in the supermarket. We might say: “What’s the point? He or she must have been in a rush? No one ever listens to me anyway!” If this is indeed something that is important to me, and I choose to

confront, it is important for me to feel enabled to do so.

When we do not value ourselves, we cannot expect others to respect us--let alone attach significance to our words and opinions.

**Remember:**

Labels belong on jars not on people.

Dona Buckberger.

## Self-Advocacy



Self-Advocacy requires

- **Knowledge**
- **Courage**
- **Action**

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Historically, persons with disabilities have been granted few, if any, rights. As a result, many persons with disabilities put others' needs above their own. They may view assertive behaviour as aggressive behaviour, even selfish. They may have a genuine fear of reprisal. We often wish we had some of the qualities we see in others, feeling we can never attain them ourselves. We might make up reasons for not saying anything to the person who pushes past us in the supermarket. We might say: "What's the point? He or she must have been in a rush? No one ever listens to me anyway!" If this is indeed something that is important to me, and I choose to confront, it is important for me to feel enabled to do so.

## **Improving our Self-Esteem**

### **Goals:**

- ▶ To discover some of our personal qualities
- ▶ To practice self disclosure
- ▶ To value our uniqueness
- ▶ to nurture and value ourselves
- ▶ To work on identifying areas in our lives that might require change

### **Rationale:**

This session helps participants discover and reaffirm some of their qualities and strengths. When we recognize areas in our lives that need to be improved upon, this is the first step toward change.

**High self-esteem is a valuable component to assertive behaviour and self-advocacy.**

### **Tools:**

Flipchart, pens, paper, file cards, potted plants or fresh flowers if available.

### **Method:**

#### **Warm up:**

Ask participants to think of their favourite flower. Put a fresh flower on display in a

vase of water and another out of the vase in a wilted state.<sup>4</sup> Use potted plants if they are more readily available. Ask the participants to brainstorm what a flower needs to survive: sunlight, water, fertilizer, care. Are two tulips alike? Does one tulip have some markings or shades of colour that make it unique or different from another tulip? You may want to describe the same scenario referring to trees and shrubs like paper birch, weeping birch, pine or oak. We are really discussing ways to describe and nurture the self.

## **Discussion**

### **Questions for Consideration:**

- ▶ What do we need to thrive? What we need and what we want are two different things. We need food, shelter, good health (physical, psychological, and spiritual), nurture, human contact, support, and friendships.
- ▶ Are we all the same or do we each possess unique qualities?

Refer to the theory box on self-esteem as you encourage each participant to recognize his or her uniqueness. You may want to use the term self-esteem on an ongoing basis to avoid confusion rather than switch between self-worth, self-respect etc.

## **Exercise 1**

Have each participant draw a flower to represent him or her self. The flower should include the following:

- a. Centre: my name

---

<sup>4</sup> This exercise adapted from *YWCA Discovering Life Skills*, Volume VI.

- b. Petals: 5 qualities I like about myself
- c. Leaves: 2 things I want to change about myself
- d. Roots: any hobbies, friends, pets

Divide the group into groups of two and have each partner describe his or her flower to the other. If you choose to discuss a tree, the same analogy can be applied.

## **My Flower**

**Discussion:****Questions for Consideration:**

- ▶ Does our flower present an accurate picture of whom we are?
- ▶ Do we like the flower?
- ▶ Is the flower well nourished or does it need some attention?
- ▶ Whose responsibility is it to pull the weeds around the flower?
- ▶ Has the flower blossomed or wilted over the past year? Why?
- ▶ How would we like our personal flowers to look in one or two years from now?

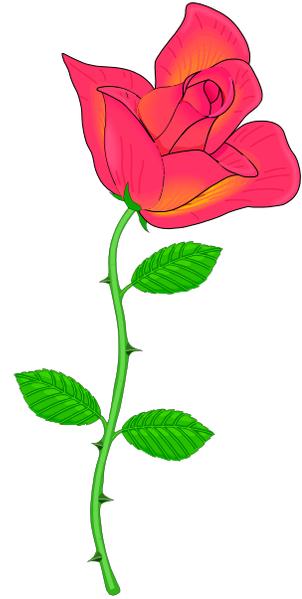
Bring participants back to the large group. As a group, list on the flipchart what we need to grow and thrive. Once we know what it takes to make a plant flourish and take the steps to see that the requirements are met, we can wait for the blossoms. Of course, we have to buy the fertilizer, mix it, and take time to see that the conditions remain favourable, but the results are worth it.

**Remember:**

An acorn can grow into an oak tree.

### **Theory Box: Self-Esteem**

Self-esteem is an indication of how we feel about ourselves. Similar terms are self-worth, self-respect, or sense of self. Self-esteem is linked to self image or how we see ourselves, self-awareness or how well we know ourselves, and self-confidence or how comfortable we feel with ourselves.



Self-esteem can be affected by our past relationships, societal attitudes, and how we respond to our disability. If we are continually told we cannot do something, we finally believe we cannot do it and stop trying. In fact, we may give up on attempting to do things we can do. We soon depend too much on others rather than ourselves.

To increase our self-esteem, we can listen to self-help tapes, practice affirmations, surround ourselves with people who make us feel good, and pamper ourselves. We can initiate, plan, and follow through on activities that are meaningful to us.

Self-talk: how you talk to yourself is how you are. If we say we can't do something, we won't be able to do it.

**Changing how we feel about ourselves is not an easy task.** If we wait for change to happen to us, without trying to manage it for ourselves, we are **reactive** rather than **pro-active**. When we try to influence change or make things happen, we are responding **pro-actively**. Self-advocacy requires **action**.

## **Theory Box: Components of Self<sup>5</sup>**

**ME!**

**Self-Confidence**

**Self-Esteem**

**Emotional Awareness**

**Behaviours**

---

<sup>5</sup> Created by Michael Horne, CAILC

## Steps to Happiness

- ▶ You can't be all things to all people
- ▶ You can't do all things at once
- ▶ You can't do all things equally well
- ▶ You can't do all things better than everyone else
- ▶ Your humanity is showing just like everyone else's
- ▶ So:
- ▶ You have to find out who you are and be that person
- ▶ You have to decide what comes first and do that
- ▶ You have to discover your strengths and use them
- ▶ You have to learn not to compete with others because no one else is in the contest of being you
- ▶ Then
- ▶ You will have learned to accept your own uniqueness
- ▶ You will have learned to set priorities and make decisions
- ▶ You will have learned to live with your limitations
- ▶ You will have learned to give yourself the respect that is due
- ▶ You will be a most vital mortal
- ▶ Dare to believe
- ▶ You are a wonderful, unique person
- ▶ You are a once-in-all-history event
- ▶ You have a duty to be who you are
- ▶ Life is not a problem to solve, but a gift to cherish and you'll be able to stay one up on what used to get you down



Author Unknown

## **Nurturing the Self**

Using the Steps to Happiness and Components of Self Theory Boxes, describe how a person not only develops self-esteem, but also finds ways of maintaining it.

Open up a discussion on different ways that members of the group maintain their self worth and build self-esteem. List them on the flipchart. You may want to include various ways of nurturing the self, such as yoga or aromatherapy.

Participants should learn to trust their own instincts regarding ways to nurture themselves. You may want to play some relaxation tapes and/or burn some vanilla/lavender candles. Invite a guest speaker, such as an aromatherapy expert to give a demonstration on candles and scents. Invite someone in the community who plays the clarinet or violin to perform a short recital. Go to the local library and borrow a tape or CD by Enya (*The Memory of Trees*) any work by Zamfir, or Loreena McKennitt (*Parallel Dreams*).

## **Exercise 2**

Distribute one file card to each participant. Using the Affirmations Theory Box as a model, have each participant write down in large print three affirmations that directly attest to his or her power or wisdom. The participant does not have to repeat these aloud at this time. Instead, ask each participant to take the cards home and meditate on the affirmations. They can be pinned to a mirror or put in a prominent place. When relaxed, the participant may choose to light a candle and repeat the affirmation to him or her self at least three times on several occasions over the course of the next week. Make sure that you check the results.

**Note to Facilitators:**

Remind participants that it is possible to change one's concept of self. Talk about the success story of Terry Pendergrass, a famous pop singer from the USA who has just returned to recording and singing after an accident, which left him paralysed from the chest down. Terry's CD *Love Language* may be available. Terry had to believe in himself before he could return to singing on stage. Terry, by example, advocates for persons with disabilities. **Self-esteem and advocacy are deeply entwined.**

**Remember:**

Self-esteem is like a muscle. You must keep working it. You can't develop it and expect it to last forever.

## Affirmations for Building Self-Esteem



Affirmations are brief positive statements that affirm or make firm our health, power, and wisdom. An affirmation is repeated again and again when we are in a relaxed state. You don't have to repeat the affirmations aloud. You can write them down repeatedly.

### When using affirmations:

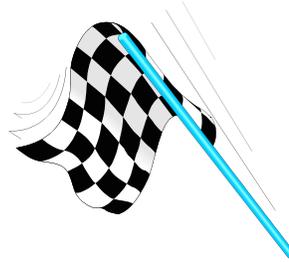
1. Always use the present tense. Phrase the affirmation as if it already exists: "I have the strength and resolve to deal with this situation!" NOT "I will resolve this."
2. Phrase affirmations positively: "I feel refreshed" NOT "I am not tired."
3. Make them short and sweet. You don't need to rationalize to yourself.
4. Affirmations don't work if they don't relate to something you want.
5. When feelings come up when you are making affirmations, it is important to look at where these feelings come from. It is important to want the state you are affirming for yourself and NOT for someone else.
6. Use **three** versions:

### EXAMPLE:

- ✓ *I, Sharon, am powerful and effective*
- ✓ *You, Sharon, are powerful and effective*
- ✓ *Sharon is powerful and effective*

## Prerequisites for Change<sup>6</sup>

1. Safety
2. Security
3. Increased self-esteem
4. Supports
5. Willingness to take risks
6. Motivation, both internal and external
7. Belief in our reasons for change
8. Reward, or satisfactory outcome



Remember:

People who say it cannot be done should not interrupt those who are doing it.

Anonymous

and:

Habit is habit and not to be flung out of the window by any means, but coaxed down the stairs one step at a time.

Mark Twain

---

<sup>6</sup> Adapted from *Advocacy Training Manual*, CMHA, Winnipeg.

## **Making Room for Change**

### **Warm Up:**

Open up a discussion on change: everybody reacts to change in different ways. Sometimes change can be a good thing and sometimes things are just better left the way they are. People are also ready for change at different times in their lives. We may be able to identify with the person who says “My husband came along at the right time in my life: my career was flying; I had a good job, and I was ready to settle down. On the other hand, couples have said “This is not the right time to have a baby.” People can only handle so much pressure in their lives; the necessary resources may not be readily available. Some people prefer consistency: routines are hard to break. Deciding when and how we move in regard to self-advocacy is the choice of the individual making that decision. But remember advocacy involves change.

### **Exercise 3**

Divide the large group into small groups of two. Hand out copies of the *Contract for Change* to the participants. Referring to the Theory Box on Steps to Change, have each participant make a contract with him or her self to initiate some sort of change in his or her life. Have the participants work with their partners to explore resources in the community that can assist the participant in bringing about this change. What will be the consequence of this change? Changes must be realistic; no change is too small. One participant may want to ask her parents to phone her before they visit her. Provide positive reinforcement as she begins to set parameters regarding her own space. This suggests she values her time and her self. If a participant identifies a change that is too drastic/unrealistic, help him or her break the change down into organized steps to reach the end goal. This helps reduce

anxiety or disappointment when things do not progress or change all at once.

Circulate among the participants as they fill out the contract. Initiate dialogue on different ways of bringing about the changes outlined by each participant.

Encourage participants to be clear and concise in their own contract, but reassure those who may not want to reveal all aspects of their promise. For some participants getting to the stage of self-identifying a need for change is a big victory: the ability to articulate it to others may come later. The facilitator may want to help some of the participants fill out the contract.

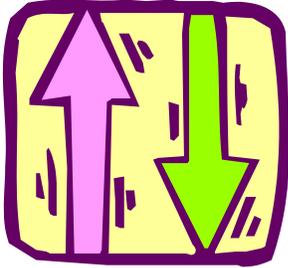
Suggest that each participant share the contract with a partner. Sharing this contract with another person solidifies the promise that the participant makes with him or her self. Although articulating the contract may solidify the commitment and promise, it may be difficult to discuss one's obstacles or challenges along the way. Make sure that each partner checks the progress on these contracts over the course of the workshop. Make a note to yourself to check back in several weeks.

**Note to Facilitators:**

It is important to be aware that some of the “Contracts” and goals might be highly personal. For this reason, the partner which someone has must be trustworthy. Remind the group of the posted Group Rules and confidentiality. Make yourself available outside of the group.

## Steps in Bringing about Change

Read from point 1 to 6 to reach your goal . . .



### *1. Awareness*

Become aware of what it is you want to change.

### *2. Ownership*

Take responsibility for what is yours to change and let go of what is not yours.

### *3. Explore Alternatives*

Brainstorm and list alternatives or options regarding what it is you want to change.

### *4. Consequences*

Resources: make an inventory of your strengths and limitations (internal resources) and then check out what other resources (external) are available to augment your areas of need. Look for areas in which you need more support.

### *5. Commitment*

Make the commitment to change. Prepare yourself for success.

### *6. Action*

Make the change.

**Remember:** If things don't turn out as you planned, go back and reexamine your options. **You haven't failed!**

## *Contract for Change*



1. What would you like to change?

---

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---

---

2. What are your fears and/or other issues which are stopping you from making this change?

---

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3. What might I gain from or lose if this change occurs?

Gains

Losses

<hr/>	<hr/>

4. I will begin by taking the following steps:

a. \_\_\_\_\_

\_\_\_\_\_ b

• \_\_\_\_\_

\_\_\_\_\_ c.  
\_\_\_\_\_.

5. The resources or supports I will need include:

- a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
  - d. \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

6. I can sabotage this for myself by:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

7. In initiating this plan I feel:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

8. Once I follow through with this plan I will feel:

\_\_\_\_\_ 9

. I am making this contract with myself because I believe I can take positive steps that will give me more control in my life.

YES or NO (circle response)

Signature and date:

**Evaluation:**

Review the session and ask the participants what they have learned about themselves and about how self-esteem relates to change and effective self-advocacy? Ask them how they felt about initiating ideas and problem solving?

Close with the idea that

*Change is inevitable, but growth is optional.*

Anonymous

**Lead in to next module:**

Ask the participants to bring the name and description of a person they know who is assertive to the next session. Have them be prepared to define assertive behavior. This will enable you to connect self-esteem to assertive behavior as it relates to advocacy.

## Section Two

### Module Four: Assertiveness and Self-Advocacy

#### Key Considerations:

A person with high self-esteem values him or her self and, as a result, finds it easier to be assertive. Why is this? The person:

- ▶ Recognizes that his or her needs are important
- ▶ Is prepared to communicate what he or she wants in a clear and well-informed manner
- ▶ Recognizes self as having strengths

Most people are assertive in some situations and not in others. Some find it easier to be assertive with strangers, others find it easier to be assertive with friends.

Some people will not assert themselves in situations where they feel reprisal is inevitable. However, when we stand up for ourselves and express our honest

feelings and thoughts in a direct and appropriate way, everyone will benefit. A person can only change his or her behaviour toward another person when he or she is aware of how that behaviour affects the other person. Interpersonal relationships are hurt when we try to control others through hostility, intimidation, or guilt.

When we sacrifice our rights, we frequently teach others to take advantage of us.

When people respond to situations in an aggressive rather than an assertive manner, it does not necessarily follow that they are confident individuals. In many cases they may have as low a self-esteem as persons who are generally quiet and passive.

## Theory Box: Styles of Behaviour



Styles:	Passive/Non-Assertive	Aggressive	Assertive
<b>Approach to Others</b>	I'm not ok, but you are ok	I'm ok, but you're not ok	I'm ok and you're ok
<b>Decision-Making</b>	Let others choose	Choose for others	Chooses for self
<b>Self-Esteem</b>	Low	High or low	Usually high
<b>Problem Situations</b>	Gives in	Prefer to attack	Direct confrontation and negotiation
<b>Response of Others</b>	Disrespect, frustration	Hurt, humiliation	Mutual respect
<b>Success Patterns</b>	Success by luck or charity of others	Beats out the opposition	Attempts a win-win situation

## Assertive Behaviour

### Goals:

- ▶ To be able to recognize assertive behaviour
- ▶ To share feelings or needs in an assertive manner

### Rationale:

The facilitator needs to create a safe environment for participants to rehearse assertive behaviour.

### Tools:

Flipchart, markers, bold jacket or big hat.

### Method

#### Warm Up:

Have participants define assertive behaviour. Have the participants describe persons they know who are assertive and list the qualities that the person possesses on the flipchart. Make the connection between high self-esteem and assertive behaviour.

Dispel the myths associated with assertive behaviour. These include the notion that:

- ▶ Assertive people are bullies
- ▶ Assertive behaviour is always confrontational
- ▶ Assertive behaviour is selfish
- ▶ Assertive behaviour always gets you what you want
- ▶ Assertive behaviour will cost you your friends

Refer to the Theory Box on Styles of Behaviour to dispel some of these myths.

### **Discussion:**

Assertion occurs when a message expresses the speaker's thoughts, feelings, and needs clearly and directly without judging or dictating to others. This method of communication offers us the best chance of reaching our goal. It maintains self respect as well as the respect of the person we are communicating with.

There are several factors to consider when asserting oneself:

- I. The situation
- II. The receiver
- III. Your goals

There are some situations when aggressive behavior is warranted. If a child persists in playing on the grassy verge of a busy street, the mother is appropriate if she shouts, "Come back into the yard right now!" If the boss has obviously had a trying day and demands you "Fill the order right now!"--it is best to fill the order. Both situations can be discussed when tempers are less volatile and the crisis is over. Sometimes a moral obligation can also keep us silent. We prefer not to spoil the Christmas dinner by confronting a family member about his or her inappropriate behaviour. However, we can make the point later.

### **Exercise 1**

Using the Handout titled *The Most Assertive Response*, ask participants to read over the various situations and respond to each with the answer they would normally give, and the answer they feel is the most effective or assertive response. Make this a fun exercise. The facilitator and an assistant may want to role play the purchase of

a big hat or bold jacket demonstrating passive behaviour. We can all identify with a pushy sales assistant who sold us something we never intended to buy in the first place. There is also that pushy door-to-door salesman..

## **Exercise 2**

Once the participants have discussed the situations as a group, divide them up into groups of three and ask them to role play the scenario they can relate to most. Have one participant play the speaker, one the respondent, and one the observer. Have the respondent reply to each scenario in a passive, aggressive, and an assertive manner. Ask the observer to note the body language, eye contact, and believability of each response. Have the participants change roles until each has had an opportunity to be the observer, the speaker and the respondent.

## **Discussion**

### **Questions for Consideration:**

- ▶ Do “I” messages prove more effective than “you” messages? Why?
- ▶ What happens if body language, such as the way the individual holds his or her arms, how close he or she stands to you, or eye contact and message do not agree?
- ▶ What did it feel like to play each role? Which did you prefer? Why?

### **Note to Facilitator:**

Provide encouragement as participants take risks and role play assertive behaviour. Refer to the *Words to Remember* sheet when applicable.

## The Most Assertive Response

### Situation 1

You are in the doctor's office. You have sat in an open back gown for 45 minutes waiting for the doctor to come and examine you. When she arrives with a smile saying, "and how are you today?" you say:



- a. "Fine."
- b. "How do you think I am after waiting all this time?"
- c. "Frankly Dr. Alonso, I am upset. I have been half dressed in this cold room for nearly an hour. I understand you have other patients to see, but could we come to some sort of agreement if I am to sit for so long in the future?"

### Situation 2

You are in a store. You are shopping for a black jacket. The salesperson insists you look better in the green. She insists you "Take the green. It does wonders for your body shape!" You:

- a. Take the green and thank her for her advice.
- b. Walk out of the store after saying "I'll think about it."
- c. Say "Thank you for your interest, but I really prefer the black."
- d. Shout "I'll take the black!"

### **Situation 3**

You are lost. You finally ask a passer by for directions. He points the way calling you “honey” and “sweetie pie” in a very condescending manner. You say:

- a. “Watch who you’re calling honey!”
- b. “Thank you for the directions, but I would appreciate not being called ‘honey’.”
- c. Mumble under your breath at his rudeness and walk away.

### **Situation 4**

You are waiting outside the movie theatre for your friend. You are eager to see the movie but your friend is nearly half an hour late. When she finally shows up throwing out apologies for not being able to get off the phone with another friend, you say:

- a. “Oh, that’s OK. Let’s go in.”
- b. “You must be really happy: we’ve missed the first half hour of the movie.”
- c. “I’m glad you finally got here, but could we go some other night instead. I want to catch the entire movie.”

### **Situation 5**

You have spent two weeks completing a project. Your friend stops by and compliments you on the excellent work.

- a. You say, “Oh, it’s nothing.”
- b. Change the topic of conversation.
- c. Thank him or her and say, “I put a lot of work into it. I’m glad you like it.”
- d. Give him the piece of work.

## Words to Remember when Communicating in an Assertive Manner<sup>1</sup>

I guess we see it differently . . .

I'm not able to fit that into my schedule . . .

I guess you misunderstood me; I meant to say that . . .

What alternative can we come up with regarding . . . ?

I understand your point of view, but I . . .

There is something important I would like to discuss . . .

May I make a suggestion . . . ?

Let's see if I understand this correctly--you want . . .

I have a problem with your opinion on . . .

I'd prefer not to . . .

I would rather not . . .

When can we talk about this . . . ?

No thank you . . .

Yes, I do mind . . .

I agree

I disagree

I can't give you an answer on that right now . . .



## **Learning to Be Assertive**

### **A True Story of Self Assertiveness from Allan Simpson (1939-1998)**

In each phase of our growth, we discover new advocacy techniques. One small story I (Allan) will share with you to summarize the kind of relationship built with an individual.

At the ILRC in Winnipeg, I was an advocacy partner with a person who was ventilator dependent. She had lived in a hospital for two years and was unable to get back in the community. She lived in a small room and was desperate to get out.

The doctor of this respiratory unit intended on expanding it by taking over a wing of an antiquated municipal hospital and developing a whole new empire over there. He wanted Cathy to be the first patient to go over there. He strenuously lobbied her to accept her fate as one within a hospital setting for the rest of her life. Cathy was 24 and determined to go back to college so that she could return to a normal lifestyle.

The doctor arranged for a meeting on a particular day when they were going to let her know when she was to move. He told his secretary to phone me to join them at the meeting at 9:30 in the morning. When I checked to confirm this with Cathy, she said, "No, that's not true, the meeting is around 8:30am – what's going on here?" I said, "It's obvious they don't want me there." It was clear that only one thing could have happened; a group of professionals were getting together with Cathy to outline her future.

I asked Cathy if I should come to the meeting with her. She said, "I think it's better if I try it myself." I said, "Ok, there's one technique I'll share with you. When they're about to say you can or cannot do something, take your pen in your hand, make sure your paper is open and say, 'Oh, doctor, just a minute. Let me write that down - you're saying that I, Cathy, am not allowed to do this. Can I just write that down?'"

When the meeting took place, Cathy made this comment three times and, you know, they just stopped in their tracks. By the time the meeting was over, she could go wherever she wanted - no hospital! IL is an exciting personal growth and development process.

Cathy chose to advocate on her own behalf in the above scenario. With the support of Allan Simpson, she was ready to assert her own needs.



## **Confrontation and WIN, WIN Situations**

When someone has said or done something we do not like or approve of, we need to confront the person regarding the behaviour. The WIN technique is an assertive tool that allows for insight, cooperation and change. It is a way of:

- ▶ Identifying the behaviour that offends us
- ▶ Allows us to inform the person how that behaviour affects us
- ▶ Encourages cooperation and change

The WIN situation reads as a formula but need not be used in a rigid manner. It serves as a guide to responding appropriately to what we feel may be inappropriate behaviour.

### **Goal:**

- ▶ To understand the use of the WIN formula
- ▶ To practice the WIN formula in a safe environment

### **Rationale:**

The WIN formula is a tool that enables the individual to sort out quickly what it is he or she wants to say in a clear and organized manner.

### **Tools:**

Basket, scissors, pieces of paper and pens.

## **Method**

### **Warm Up:**

Ask the participants how they normally deal with conflict? Very often, how each participant's parents dealt with conflict as he or she was growing up contributes to the way the participant deals with conflict in the present. There are some people who avoid conflict altogether, while others view conflict as the road to aggressive, even violent behaviour. Be sensitive to participants' histories. Referring to the Theory Box on WIN WIN Techniques, explain to participants how the WIN technique works.

### **Exercise 3**

Make a list of WIN situations on a piece of paper. Cut them up and place them in the basket. Divide the group into groups of two. Have one member from each group pick out a situation from the basket and role play the situation with a partner using the WIN technique. Have each group member role play the "assertor" and the "resistor" position.

## **Discussion**

### **Questions for Consideration:**

- ▶ Which assertive skills learned to date did you use effectively in each scenario?
- ▶ How do you feel about the responses you received using the WIN technique?
- ▶ As a "resistor" what suggestions do you have for your partner on how to be more assertive in his or her confrontational response?

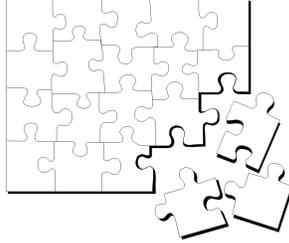
### **Evaluation:**

Ask the participants how they felt about responding in an assertive, passive, or aggressive manner. What is the difference? Ask them to take one opportunity to use one of the assertiveness techniques they have learnt to date before the next session. Make the connection between self-esteem, the desire for change, and assertive behaviour. Ask participants how the contract they made with themselves is coming along? This can be a time for positive reinforcement or reevaluation and reformulation of plans for change.

**Lead in for next module:**

Have participants review the *Forms of Advocacy* and *Steps to Change* handouts dealt with in earlier sessions and ask them to bring these handouts with them to the next session.

## Theory Box: The WIN Formula



**W** Stands for **WHEN** = **When you** . . . [state the behaviour you do not like]

**I** Stands for **I FEEL** = **I feel** . . . [express your feelings or thoughts]

**N** Stands for **NEED** = **I need** you to . . . [specify what you want to change]

### EXAMPLES:

- ✓ “When you constantly make jokes about persons with disabilities, I am offended; I would appreciate it if you did not repeat these jokes in my presence.”
- ✓ “When you shout at me in front of the other employees, I feel very self-conscious; I need you to address any problems you have about my work with me in private.”

## **Learning to be Assertive**

## WIN Technique: Practice Situations

1. Your roommate always leaves the bathroom in a mess. You want to set up a work schedule for household tasks.
2. You are at a party. You have been on a diet and your friend is calling you a miserable companion because you aren't eating anything.
3. You are in a restaurant and your friend lights up a cigarette before you have finished eating your meal.
4. You have been assigned what you consider to be an unfair amount of work by your employer. You observe that others in the office doing similar jobs are not as busy.
5. You are waiting to be served at a counter in a store, but the salesperson is talking with another assistant. She is purposely ignoring you.
7. You have spent months sculpting what you think is a very nice clay sculpture. You invite a friend over to see it. He thinks it is terrible and adds that "a child could have done better."
8. You work in a store and a customer calls you "honey" in a suggestive manner.

## Section Two

### Module Five: The Advocacy Process

#### Key Considerations:

In Module Three and Four, we learnt how self-esteem and assertive behaviour influence our ability to become effective self-advocates. Low self-esteem and non assertive behaviour can be described as personal barriers to self-advocacy. There are other barriers that hinder the process of advocacy. Other barriers include societal attitudes, such as discrimination<sup>7</sup> and stereotyping,<sup>8</sup> as well as problems with the system itself, such as various mechanisms that delay or prevent the individual from reaching his or her goal. Finally, human error is a factor that must be taken into account: sometimes a person forgets to pass some vital information on to his or her associate; sometimes a person refuses to take the responsibility for bringing about change or meeting a request; and sometimes a person just doesn't want to listen. Remembering that the road to life begins with one small step, we are wise to equip ourselves with the tools that enable us to become effective self-advocates.

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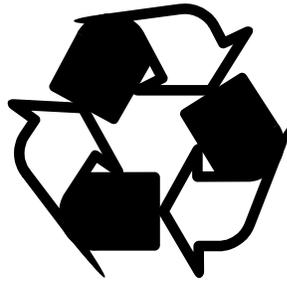
<sup>7</sup> Discrimination includes behaviour that occurs when someone treats a person with a disability in a way that he or she would not treat anyone else in society.

<sup>8</sup> A stereotype involves a mental concept that is held by a group in regard to another group or person. It includes attitudes and opinions about persons with disabilities that generalize and incorporate uninformed judgements about persons with disabilities. For example, all persons with disabilities are incapable of making their own decisions, earning a living, or having sexual relationships.

## Theory Box: The Advocacy Process<sup>2</sup>

### Preparation

Define the issue  
Gather information  
Identify supports



### Evaluation

Examine results  
Review the effectiveness  
of the Action Plan

PI

### Planning

Review the issue  
and identify the preferred  
solutions  
Choose a route  
Develop the plan

### Action

Carry out plan

The advocacy process can be divided into four phases: **Preparation, Planning, Action, and Evaluation.** The phases are not unlike the *Steps in Bringing About Change* discussed in module three except for the addition of the evaluation phase.

### **Phase One: Preparation**

It takes more than just recognizing there is a problem to this phase. It includes:

- i. *Defining the issue:* Sometimes there are several minor issues that relate to a major issue. The major issue can be clouded by these smaller issues because the smaller issues may be more of a personal nature. For example, we should not advocate to have an abusive alcoholic neighbour evicted from our apartment building because we don't approve of alcohol consumption; he or she should be removed on the basis of documented evidence of his or her abusive behaviour toward several residents.
- ii. *Gathering information on the issue:* What may have worked in the past to resolve an issue may no longer be a viable alternative in the present. Community resources and peer support networks need to be explored to the fullest.
- iii. *Identifying the supports:* Consumers, decision makers, and the public may all have a vested interest in the outcome; they may be willing to aid in the action plan.

### **Phase Two: Planning**

It is important to work out a strategy.

- i. *Review the issue and identify the preferred solutions.*
- ii. *Choose the preferred route.*

- iii. *Develop the action plan.*
- iv. *Check and revise the action plan.*

### **Phase Three: Action**

- i. *Move strategically and accurately toward your goal.*
- ii. *Keep a record of all documents en route.*

### **Phase Four: Evaluation**

There is no right or wrong way of dealing with an issue. The choice remains with the individual. Sometimes it is more advisable not to extend oneself emotionally or physically in pursuing the goal we originally set out to achieve. Other times the outcome may benefit others more than ourselves. For example, those that advocate in 1998 for some form of compensation for Hepatitis C sufferers may not be able to benefit. This should not dissuade them from fighting for policy change.

### **Remember:**

Our plans miscarry because they have no aim. When a man does not know what harbour he is making for, no wind is the right wind.

**Seneca**

## The Advocacy Process

### Goals:

- ▶ To be able to understand the steps to the advocacy process
- ▶ To understand there is no right solution: the choice rests with the individual
- ▶ To be able to practice assertive behaviour within several advocacy roles

**Rationale:** The participants need to familiarize themselves with the steps to the advocacy process using scenarios that are realistic and attainable.

### Tools:

Flipchart, markers, scissors, basket to hold pieces of paper.

### Method

#### Warm Up:

Ask the participants to identify issues that require advocacy. These can be either issues that are of concern to them today or one's they have resolved in the past. List some of these on the flipchart and have the participants decide on an issue to work on as a group. The facilitator may want to draw the circle of the Advocacy Process on the flipchart and point to each section methodically, asking for points for consideration and workable solutions as the group comes up with an Action Plan. Point out flaws in the Action Plan as you go along rather than set the group up for failure. It is important for the participants to be able to refer to handouts on the *Forms of Advocacy* and the theory box on the *Advocacy Process* as they work on the different phases. If more convenient, refer to *Mary's Story*. Remember to stress such factors as time frame, energy, financial resources, and availability of human

resources as you move through each phase.

## *Mary's Story*

**Background:** Mary is a first year, part-time student at Sky College.



### **Phase One: Preparation**

#### *Define the Issue:*

Mary, who is a quadriplegic, wants to take Psychology 101, but the college classroom is inaccessible to a person who uses a wheelchair. The main issue is Mary's desire to take Psychology 101. The larger issue is one of rights: All students, regardless of whether they have a disability, have the right to enroll in any class they are academically qualified to take.

### **Phase Two: Plan**

#### *Review:*

In the past, another professor advocated on Mary's behalf to have History 104 shifted to a more accessible classroom, but he has since left the college.

#### *Preferred Solutions:*

Mary has several avenues available to her including the Department of Psychology, the College Advisor, the College Counsellor, the Dean of Student Affairs, the College Students' Association, other students with disabilities who are already in the college or plan to enter the college, and the CCD (Canadian Council on Disabilities) (if in Saskatchewan, the Voice for People with Disabilities) to name but a few.

***Choices:***

Mary identifies the immediate problem as inaccessibility to the Psychology 101 classroom. The larger issue is one of accessibility for all persons with disabilities to all classrooms. As the psychology course begins in a few months, time is of the essence. Mary plans to write a letter to and meet with the Dean of Student Affairs at the college and meet with the professor of the course at the Department of Psychology to ask for her support. Mary's letter is the first step toward access to all classrooms for all students with disabilities.

**Phase Three: Action*****Step One:***

Mary meets with the psychology professor who agrees to support Mary's letter and also write one of her own. Mary asks for a copy.

***Step Two:***

Mary writes the letter to the Dean of Student Affairs noting the support of the psychology professor. She makes an appointment to see the Dean of Student Affairs.

***Step Three:***

Mary delivers the letter in person to the Dean of Student Affairs. She sets the stage for accessibility to all classrooms for all students.

***Step Four:***

Mary speaks with the CCD (in Saskatchewan: The Voice of People with Disabilities) to discuss strategies. She decides to ask them for a letter to support the accessibility

of all classrooms for all students with disabilities at Sky College. She approaches her peers who have various disabilities for similar letters of support.

***Step Five:***

Mary arranges a meeting with the Head of the College. She takes with her copies of her letter to the Dean of Student Affairs, the letter from her psychology professor, letters from other students with disabilities, and the letter from the CCD to reinforce her request.

**Evaluation:**

***Outcome:***

The classroom venue for Psychology 101 is changed to one that is wheelchair accessible. Mary attends Psychology 101. Meanwhile, the college reviews and changes its policy, allowing for accessibility to students who not only use a wheelchair, but also bring attendants and scribes into the classroom. The Head of the College uses available funds to build an elevator in the college's classroom annex.

## **Discussion**

### **Questions for Consideration:**

- ▶ Would the outcome have been the same if Mary had only approached the professor of the psychology course?
- ▶ What was the cost (physical and emotional) of Mary's plan?
- ▶ Why did Mary see the professor, the Dean of Student Affairs, the representative of the CCD (or Voice of People with Disabilities), and the Head of the College in person?
- ▶ Can you think of any other solutions?
- ▶ What if the letter proved ineffectual? Were there back up strategies already in place?

### **Exercise 1**

Divide the participants into groups. List three issues that require advocacy on a piece of paper. Have each group pick out one issue randomly from the basket. Ask the group to develop an Action Plan for the issue in hand. The facilitator and his or her assistant can circulate to provide ideas and feedback. Hopefully, two groups will come up with different solutions to the same issue. This can then be taken back to the large group for final evaluation.

### **Examples:**

- ✓ Bill, who has multiple sclerosis, wants to deal at the bank just down the street from his apartment, but the step up into the bank is inaccessible. Bill uses a wheelchair.
- ✓ Margot, who has cerebral palsy, is 19 years old. She lives in a group home with four other residents. They want to be able to stay up late on week ends to

watch movies or visit friends. The leader of the group home wants lights out by 10.30 p.m.

- ✓ Joshua, who has a hearing impairment, is in his second year of university. He dropped a class in Statistics before the required deadline. However, when the results of his grades are issued, the Statistics course is recorded as F (a fail) instead of a W (withdraw) on his transcript.

### **Exercise 3**

Have the participants remain in the same groups as for Exercise 2. Ask the participants to role play the various people they would need to approach regarding the same issue for which they have just developed an Action Plan. For example, in the case of Mary's story, one participant could play Mary, another the Dean of Student Affairs, and another the professor who will support Mary.

### **Discussion**

#### **Questions for Consideration:**

- ▶ What is it like exploring the same issue from different perspectives?
- ▶ How do you feel when you anticipate the response you might get to a situation? Are you better prepared?
- ▶ Whose behaviour can we predict the most?

**Evaluation:**

Recap on the importance of putting together a solid action plan when looking at issues that require advocacy. Remind the participants that plans can be revised time and time again. There is no “perfect “ plan. There is no failure. It is important to take a step that the consumer is comfortable to take.

**However, there are times when not acting is acting in one’s best interest, especially if the end result proves too stressful, or more painful.** Any decision not to take action is the **choice** of the individual. That individual may choose to ask for emotional support instead. Safety is the first consideration in any prerequisite for change (see Section Two: Module Three).

Remind participants about the connection between self-esteem and assertive behaviour in developing and following through on Action Plans.

**Remember:**

Do what you can with what you have where you are.

Theodore Roosevelt

**Lead in to next module:**

Ask participants to list various methods of effective communication and which method they feel the most comfortable with and why?

## **Section Two**

### **Module Six: Effective Communication and Self-Advocacy**

#### **Key Considerations:**

The development of communication skills enhances self-esteem and mutual understanding. A basic requirement in any relationship is the need to understand and be understood. If someone gives us directions on how to get to his or her home, we either write them down or repeat them back to the speaker to make sure we understand where to go. If we are in a meeting, we may ask for clarification on a topic we are not familiar with. Sometimes our words and body language are incongruent: we may say one thing but our body language conveys the opposite. We have learnt in previous modules that assertive behaviour incorporates eye contact and body posture as well as language to be effective.

The knowledge and skills learnt regarding self-advocacy are effective only in the delivery, or the way they are communicated.

Communication is a two-way street: each party must incorporate active listening skills and share information/or meaning in a clear and concise manner for the communication process to become effective.

Some people think that the way they communicate is a part of their personality, even something they cannot change. Communication can be learnt and behaviour can change.

## Active Listening

### Goals:

- ▶ To review and practice active listening

### Rationale:

Even though most of us prefer to speak rather than listen, without a listener, there is no communication. Listening is not something passive; it requires attention and concentration.

### Tools:

Flipchart, markers, T.V. and V.C.R. , rental of John Cleese's *Fawlty Towers Communication* video (popcorn is optional), basket containing listening skills situation cards.

### Method

#### Warm up:

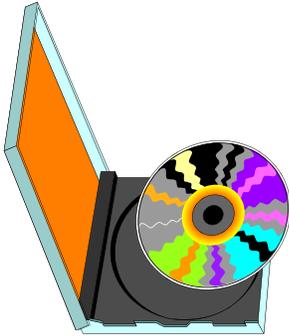
Have the participants watch the hilarious movie on *Communication* enacted by the British comedian John Cleese and his Fawlty Towers crew. It demonstrates how not to communicate! A series of mis-communications lead to one comical misunderstanding after another. Inform the participants that they will be given a quiz on various aspects of the movie to test their listening skills once it is completed. The facilitator should take notes and formulate questions that call on the skill levels of all the members present. For example, consider the name of the male servant, the name of the racehorse etc. Award a prize to the highest score and the funniest

response.

When the movie is finished, have the participants relate some of their own stories about mis-communication. Ask for viable solutions to some of the dilemmas they describe. Use the flipchart and the Theory Box on Active Listening Skills.

If there is no movie available, organize a game of charades to illustrate ways of communicating that move beyond the written and verbal.

## **Theory Box : Active Listening<sup>9</sup>**



The way I listen is important, because it reflects my concern for others as well as myself.

### **Paraphrase**

When paraphrasing, restate or provide feedback on what you have heard in your own words to let the speaker know that you are trying to understand. Try not to repeat the exact words of the speaker like a parrot, because this can come across as condescending.

### **Reflection of Feelings**

When you reflect the feelings of the speaker, you are trying to see the world through his or her eyes. You try to identify and express the way the speaker is feeling as a means of sharing rather than telling. Do not tell the speaker he is mad or sad. Empathize with the situation by putting yourself in his or her shoes.

### **Summarize**

The listener picks out the main points of the conversation and presents them back to the speaker as briefly and as accurately as possible.

### **Check**

Check out if the information is understood correctly.

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<sup>9</sup> Adapted from *YWCA Discovering Life Skills*, Vol.1.

## **Exercise 1**

Divide the participants into groups of three. Have one of the members of the group pick out a listening skills situation card from the basket and share the situation with the small group. One member of the group acts as observer, another a listener, and the third the speaker in acting out the situation. Have the members of the group change roles so that every member has the opportunity to practice active listening skills. Ask the observer to make notes on the listener and speaker's body language and how appropriate or effective this was in the given situation. The facilitator and his or her assistant can circulate to reinforce the use of the Theory Box information on Active Listening skills and provide positive feedback for lessons learned.

### **Sample Situation Cards on Active Listening:**

- ✓ “My mother is angry at me all the time. I don't know what I've done. It could be the pressure she's been dealing with at work right now. I just don't get it.”
- ✓ “I have to go to the doctor's office for the results of the tests. A part of me wants to go and another part of me doesn't want to go.”
- ✓ “As your supervisor, your work has to improve or else.”
- ✓ “Nobody gives me the credit for anything. I feel everyone expects me to do it. I am going home.”
- ✓ “I'm not getting any sleep. The baby keeps crying and my husband ignores me.”

## **Discussion**

Sometimes we hear a message and understand it to mean the opposite of what was intended. Listening is affected by:

- i. Attitudes
- ii. Values
- iii. Beliefs
- iv. Preconceived notions and judgements

Depending on preconceived notions or beliefs about persons with disabilities and the way they might communicate differently, the person with a disability can often be blocked out by the listener. The listener may feel that his or her words are not important or that he or she is “low functioning.” Maybe some of the participants can relate to this.

## **Questions for Consideration:**

- ▶ Do we hear what we want to hear or do we hear what the person is trying to tell us?
- ▶ Are there times when empathy is best demonstrated by silence?
- ▶ How do you feel when you know the person you are addressing really understands what you want to share?
- ▶ Are we responsible for someone else’s feelings?

## **Sharing Meaning**

We can share meaning in many ways. In keeping with the theme of self-advocacy, it is important to become familiar with various methods of communication, both oral, written, sign language, and TTD.

## **Communicating in Person**

Communicating in person is one of the most effective ways of communicating. It allows for dialogue, observation, and the sharing of information that may not be possible in other formats, such as formal letters or E-mail.

When you want to meet with a person in authority to advocate on your own behalf you must prepare a plan of action. You should:

- ▶ Know your goal or intentions before the meeting
- ▶ Decide whether you will benefit from having the meeting alone or with other supports, such as a lawyer, a friend, or a peer advocate
- ▶ Plan what you are going to say well in advance
- ▶ Write down some points you may want to take with you as reminders to yourself
- ▶ Anticipate what the response of the other person will be to better defend your position
- ▶ Dress appropriately
- ▶ Take all documentation relevant to the meeting with you
- ▶ Arrive early
- ▶ Thank the person for meeting with you
- ▶ Present your issue as simply and clearly as possible
- ▶ Use “I” messages to avoid blaming
- ▶ Use active listening skills to make sure you understand what transpires
- ▶ Ask questions if you don’t understand something
- ▶ Remain calm and collected
- ▶ Make notes during the meeting or ask your support person to do so. This may help you to concentrate on what is happening in the meeting

Once the meeting has ended, allow time for both parties to follow through on commitments, such as phone calls or meetings. Phone in ten days if there is no outcome. **Keep all documentation and date it.**

### **Communicating over the Phone**

When you want to advocate effectively over the phone, there is still a need to be well prepared. In formulating your action plan, you would:

- ▶ Decide on the goal or outcome of the conversation
- ▶ Decide who will be the best person to share this information with in the company/business you are calling
- ▶ Think about what you intend to say
- ▶ Have some notes handy on relevant points
- ▶ Make sure you have the person's full name and position written down, and include a mailing address
- ▶ Make sure you identify yourself and establish a rapport
- ▶ Make sure that there is time to discuss the issue; if not ask for a time to call back
- ▶ Discuss the issue as clearly and as briefly as possible
- ▶ Allow the person time to respond
- ▶ Use active listening skills to make sure you have been understood
- ▶ Keep calm and collected
- ▶ Use "I" statements to avoid blaming
- ▶ Thank the person for his or her time
- ▶ Make notes: if the person you are communicating with makes you a promise or commitment, ask if he or she will put it in writing

When the phone call is over, make sure the notes you have recorded are clear, dated, and accurate; include the name[s] and position of the person you spoke with at the company. Do not throw them away! **Keep all documentation for future reference.**

### **Communicating by Letter**

When you write a letter, it can be a way of adding a formal and serious note to the advocacy process. As in the outlines for meetings and telephone calls discussed above, the formal letter also needs planning. Again you must:

- ▶ Decide on the goal of the letter
- ▶ Write down a rough outline of the major points you want to make
- ▶ Decide who the best person is to address the letter to
- ▶ Make a rough draft
- ▶ Write the letter out as clearly as legibly as possible or have the letter typed
- ▶ Make sure the letter is neat
- ▶ If you are expecting a response to the letter indicate this. Suggest a reasonable period to acknowledge your concerns
- ▶ Have someone proofread the letter
- ▶ Watch the tone of the letter
- ▶ Make sure the letter is dated; keep a copy for your file.

## Format for Formal Advocacy Letters

[List one below the other starting at the top left-hand side of the page]



- 1. Your own address.**
- 2. The date** you are writing the letter.
- 3. The name, title and address of the person to whom you are writing the letter**
- 4. The salutation:**  
Dear Mr. X,

### **Paragraph No. 1**

Purpose or why you are writing the letter

### **Paragraph No. 2**

Give the situation or the facts: be as accurate and concise as possible

### **Paragraph No. 3**

What you want the other person to do about it

### **5. Ending:**

Thank the person for his or her attention to the matter and include a contact phone number in bold type for future reference.

### **6. Close with**

Yours sincerely,

*Your signature*  
(Hand Written)

Type your name underneath the signature

## The ABC's of the Advocacy Phone Call

*The right telephone manner is friendly but efficient*

**ABC** Don't make the call until you have

**I** a list of questions ready to ask.

**DEF** Don't launch into a full-blown

**2** account of your problem with the person who answers the phone. Make sure you have the right person.



**GHI** Do ask to speak to someone else

**3** if the person you want to reach can't help you.

**JKL** Do identify yourself, establish a rapport

**4** with a pleasant greeting and summarize in logical order your request.

**MNO** Do listen carefully and check what the person

**5** has said. Ask questions for clarification.

**PQR** Do have all the information in hand. If the

**6** matter concerns accounts or invoices, have numbers handy. repeat what both parties have said to ensure what is to be done by whom and when.

**STU** Don't lose your temper. If you encounter rudeness, anger, or impatience,

**7** acknowledge the person's manner and ask what the difficulty is. Repeat the request firmly but politely.

**VWX** Do keep a record of the call and follow up on your call within 10 days.

**8**

## Sample Advocacy Letter

123 Main Street  
Saskatoon  
SK 1A2 3B4

November 1, 1998

The Dean of Academic Affairs  
Sky College  
1 Bridge Street  
Saskatoon  
SK 3C4 5D6

Dear Dean Smith,

Re: Mary Davies  
Student Number: 11223344

I am a first year, part time student at Sky College. I am enrolled in Psychology 101 for Spring Semester 1999. Unfortunately, as a student with a disability who uses a wheelchair, I am unable to access the pre arranged classroom for this course (Room B12, Classroom Annex).

I have thoroughly enjoyed the courses I have taken to date at Sky College. I would like to major in Psychology and complete my degree here. In fact, I have already paid the registration fee for Psychology 101.

I have spoken with Professor Thomas, who will be teaching this course, and she supports my request to have the class moved to a wheelchair accessible classroom in another Annex. I attach a copy of her letter of support for your perusal.

Thank you for your assistance in this matter. If you require any further information, I can be reached at (306) **123-1234**.

Sincerely,

*Mary Davies*

Mary Davies

## Effective Communication and Self-Advocacy

**Goals:**

- ▶ To be able to understand different methods of effective communication as they relate to self-advocacy
- ▶ To role play various scenarios using effective communication techniques

**Rationale:**

The participants are now equipped with the tools to become effective self-advocates. As a means of bringing all this information together, it is important to provide time to rehearse and rehearse and rehearse.

**Tools:**

Flipchart, markers, pens, paper, communication skills situation cards, basket.

**Method****Warm up:**

Have the participants brainstorm some scenarios or immediate issues they want to resolve using the advocacy process. List these on the flipchart and have the group decide which ones should receive priority. Some of the participants may want more assistance in writing and composing letters, while others may want to role play a meeting with a person in authority. As a means of not pressuring participants into action, the facilitator and his or her assistant may want to role play a meeting with a person in authority to demonstrate how it should not be done. This may take some planning and rehearsal, but is well worth the effort. The facilitator may want to dress inappropriately (too much make up, dishevelled hair, and boldly patterned mismatched outfit) and the assistant may want to put on a shirt and tie and a good pair of dress

pants. The facilitator, as Claudette, wants to ask her boss for a pay rise. She has been in her job for a year and was promised more money at the end of her three-month probation period. Chewing gum and carrying a coffee, she goes into the boss's office without an appointment to demand her money.

Once the role play is complete, the facilitator may want to have the group brainstorm the inappropriate behaviours demonstrated by Claudette throughout the meeting and replace them with the appropriate behaviours.

## **Discussion**

### **Questions for Consideration:**

- ▶ What steps should Claudette have taken before walking into the boss's office?
- ▶ What should Claudette have worn to the meeting?
- ▶ Did Claudette listen to the boss's rationale for not giving her the pay rise?
- ▶ What about Claudette's body language and tone of voice?
- ▶ What sort of impression did she give to the boss?

## **Exercise 1**

Divide the participants into groups. Have each group role play one of the issues the large group identified in the warm up session or have them choose a communication skills situation card from the basket. Make sure that the participants feel comfortable with the scenario. Make sure that each member of the group gets a chance to play the role of the self-advocate. Have one group member observe the behaviours of all players and record appropriate and inappropriate behaviours on a piece of paper.

## **Examples:**

✓ *Situation 1*

Mavis is twenty-nine years old. She is quadriplegic. She lives in a long term care facility. Every evening, Mavis is delivered her supper on a tray; it is nearly always cold. She doesn't want to upset the staff.

*What should Mavis do? What are her options?*

✓ *Situation 2*

Barry has a weakness down his left side following a stroke. He walks with the aid of a tripod. He is an excellent carpenter. He has held the same job for the past fifteen years. He is having trouble keeping up with the work allocated to him. He recognizes that the limited use of his left hand slows him down but is convinced that the quality of his work is still exceptional.

*What should Barry do? What are his options?*

✓ *Situation 3*

Jose has been on social services for just over a year. He has a brain injury and difficulty keeping a job. He is in a work placement situation at a warehouse, which pays him more money than he was originally receiving on social assistance. He received a letter from his social worker (whom he has never met) informing him of a 600-dollar overpayment (including interest). She is demanding he settle this overpayment. He cannot understand how this has happened. When he phones the social worker, her line is always busy and he has asked her over the phone to put the information in writing but she has not done so.

*What should Jose do? What are his options?*

✓ *Situation 4*

Joyce, who has a learning disability, had been working at her job for about a month when she received her first pay cheque. She noticed that \$25.00 dollars had been deducted from her cheque to cover the cost of her uniform. She was not aware she would have to pay for her uniform and when she asked her co-worker about it, she was told that the same amount would be deducted from her pay cheque the next month as well. Joyce is having difficulty making ends meet as it is and the loss of the money is very upsetting. She was not told about the uniform when she was hired.

*What should Joyce do? What are her options?*

## **Exercise 2**

Invite two volunteers to role play a telephone conversation between a landlord and his tenant.

Percy, the tenant has lived in the building for five years. He has a cat. When the new landlord took over the building six months ago, he put up signs in the building that no cats were allowed. Percy, who is sixty years old, does not want to lose his cat and he cannot afford to move. Percy can hear a neighbour's cat meowing in the night so he knows he is not the only tenant who has a cat.

## **Discussion**

### **Questions for Consideration before the phone call is made:**

- ▶ What are Percy's options?
- ▶ Should Percy have to move?
- ▶ Should Percy have to give up his cat?
- ▶ Where can Percy access information on housing and/or leases?

## **Overcoming Barriers to Communication as Related to Various Disability Groups**

When we communicate with various disability groups, there are certain things to keep in mind. Everyone is different--just because two people are visually impaired does not mean that they have the same wants or needs. They are two different people. Often, a label conjures up the image of an extreme case. As discussed earlier, myths need to be addressed and dispelled as they arise:

- ▶ Most persons who are considered legally blind do have some vision
- ▶ Persons with intellectual disabilities can think
- ▶ Persons with memory impairment due to a brain injury are not intellectually impaired
- ▶ Not all persons with physical disabilities use a wheelchair

## **1. Hearing Impairment**

Persons with a hearing impairment communicate in different ways. They use sign, lip reading, paper and pencil, hearing aids, TTD or a combination of these things. When communicating with a person with a hearing impairment:

- ▶ Speak in a normal tone of voice unless they ask you to speak louder
- ▶ Do not exaggerate or yell
- ▶ Speak clearly using concrete language
- ▶ Learn to recognize, practice, and use some sign language
- ▶ Face the person to whom you are speaking and keep your hands away from your face
- ▶ Be patient
- ▶ Try to limit distractions

## **2. Visual Impairment**

Most persons have some vision even if they are legally blind. When you want to lead or communicate with a person who is blind:

- ▶ Ask to be of assistance, or for his or her attention
- ▶ Do not touch the person without his or her permission
- ▶ Speak clearly and concisely
- ▶ If moving, offer your arm to be grasped
- ▶ Do not walk too fast
- ▶ Pause and inform the person before you begin to climb stairs or take sharp turns
- ▶ Stand close to the person when speaking

### **3. Wheelchair Users**

A person's wheelchair is a part of his or her body space. We should not lean on the chair or push it without permission. Remember:

- ▶ When communicating with someone who uses a wheelchair, bring yourself down to his or her eye level. Sit down.
- ▶ If the person has some difficulty moving his or her arms, body language may be incongruent: be more aware of his or her facial expressions and eye contact

### **Evaluation**

This is a comprehensive module. It may take some time to recap on all aspects of effective communication. Ask the participants what they have learned about communication as it applies to the advocacy process. When faced with a list of options, who should decide on the preferred route? Is there a wrong or a right route? Is there a right and a wrong way of communicating effectively?

Remind participants that an acknowledgment to a letter or a phone call does not

necessarily mean that the issue is resolved yet, but it will let the writer know that the recipient is “working on it” and it creates a paper trail. When to stop that paper trail is the choice of the writer and not his or her support systems.

**Lead in to the next module:**

Have the participants begin to explore resistance as it applies to government/legal systems. What are some of the legal avenues open when common strategies prove fruitless?

Make sure that participants revise and bring the handouts on the Advocacy Process, Format for Letter Writing, and Forms of Advocacy with them to the next session.

**When Communicating with Others, Promote Diversity not Difference**

## **Section Two:**

### **Module Seven: Tools for Advocates**

#### **Key Considerations:**

The advocacy process can be enhanced by knowing and understanding some of the roles that various groups or authorities play in the advocacy process. The aim of this module is to provide the group with a fund of knowledge that can be called upon as required. Each participant may choose when and where to use these tools. What is worth pointing out is that what one is not ready to do today, one may be ready to do tomorrow or even in two months. Make sure that the participants get a firm grasp of the procedures.

#### **1. Legal and Legislative Advocacy and the Court Challenges Program**

It is very important to have access to appropriate legal representation for people who believe their rights are being violated, or in cases where people feel they are being discriminated against. Sometimes, a person may feel that a particular law or action is unfair; he or she may want to take action to have that law changed. If that is the situation, the person will need assistance to research the case to see if there is enough evidence to take the matter to court in an attempt to change that particular law. This is where the Court Challenges Program comes into play. The Court Challenges Program is an independent organization. It provides assistance to a person or an organization that may otherwise be unable to afford the costs of a court action.

#### **Background**

The Court Challenges Program of Canada is a national non-profit organization that was

established in 1994 to provide financial assistance for court cases that advance language and equality rights guaranteed under the Canadian Constitution. The Program was established by equality-seeking and official minority language organizations, along with some interested lawyers and academics. The ultimate goal of the Program is to provide individuals and groups the opportunity to pursue their rights through the court system.

The Court Challenges Program consists of a volunteer Board of Directors who oversee the administrative duties of the program. In addition, there are specialized, independent Panels to make decisions as to which projects or cases will be funded and in which amounts. The Language Rights Panel and the Equality Rights Panel are made up of experienced and knowledgeable individuals with a history of involvement in equality or language issues and community organizations.

## **Equal Rights**

Equality includes giving every person equal respect in society. At times, people are discriminated against, or treated differently or unfairly because of the colour of their skin, gender, sexual orientation, religious beliefs, or the fact that they have a disability.

Section 15 of the Canadian Charter of Rights and Freedoms notes that:

- ▶ Every individual is equal before and under the law and has the right to the equal protection and equal benefit of the law without discrimination and, in particular, without discrimination based on race, nationality, or ethnic origin, colour, religion, sex, age, or mental or physical disability;
- ▶ Subsection (1) does not preclude any law, program, or activity that has as its object the amelioration [improvement] of conditions of disadvantaged individuals or groups including those that are disadvantaged because of race, nationality or

ethnic origin, colour, religion, sex, age, or mental or physical disability.

Equality is achieved through:

- ▶ Education: to prevent discrimination
- ▶ Lobbying: to bring about changes that promote equality of rights
- ▶ Court action: to challenge laws

### **The Court Challenges Program as a Funding Source**

In order to receive funding, cases must include federal and provincial language rights protected by the Constitution of Canada or challenge federal laws, policies, and practices based on Section 15 of the Canadian Charter of Rights and Freedoms. In other words, funding will be provided to those cases that have the potential to change a law, a policy, or a practice in a way that will ensure the respect of equality and language rights.

Funding will not be provided for:

- ▶ Any case that covers an issue already before the courts
- ▶ Complaints under the Human Rights Act or the Official Languages Act
- ▶ Public education, community development, lobbying or political advocacy
- ▶ Challenges to **provincial** laws, policy, or practice as it relates to equality funding only

There are four categories of funding available for equality and language rights: Case Development Funding, Case Funding, Impact Study Funding, and Promotion and Access Funding. Refer to the Theory Box on the Court Challenges Program.

## **Funding Opportunities: The Court Challenges Program**

## **Theory Box: The Court Challenges Program<sup>10</sup>**

The Court Challenges Program promotes equality by providing funding to those in need of assistance to challenge laws and promote equality issues. It enables individuals to become effective self-advocates by providing assistance that may otherwise be unavailable.

### **Types of Funding Available**

#### **A. Case Development Funding**

If you have an idea for an equality rights test case but have not worked out the details yet, case development funding may be granted to allow you to build your case and meet the requirements for case funding. A maximum of 5,000.00 dollars is available to do the legal research and prepare the equality rights argument. In some cases, it might be helpful to talk to other people who will be affected by the case. Lawyers or others with more experience on the case may also be of assistance. A further 5,000.00 dollars is available for consultation funding to talk with people in the community or with experts about the case.

#### **B. Case Funding**

This type of funding is available for the costs of taking the equality case through the court system. Funding covers costs such as lawyers fees, photocopying, telephone, fax, and other technical costs, as well as taxes on those amounts. The Program may grant permission to allow funding for witnesses, travel expenses, and other special costs. A

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<sup>10</sup> Figures quoted are as of August 1998

maximum of 50,000.00 dollars may be provided if this is the first time the case goes to trial. A maximum of 35,000.00 dollars may be provided at the appeal level. The maximum amount for interveners at the trial or appeal level is also 35,000.00 dollars.

### **C. Impact Study Funding**

This type of funding is available to do research on a court decision and its impact on the community. Impact Study Funding may be granted to a qualified person or group to examine how the findings will affect future cases.

### **D. Promotion and Access Funding**

This funding is available for equality related activities such as strategic meetings on specific legal issues about equality rights, other meetings where equality rights are to be discussed, information materials and discussion papers.

### **Who can apply for funding?**

Any person or group interested in information on issues of equality or language rights may contact the Court Challenges Program directly. There is no application fee.

In order to be eligible for funding, a particular case must:

- ▶ Test equality rights guaranteed in Section 15 of the Charter of Rights
- ▶ Be recognized as a “test case” which means that the case will serve to improve the way the law works to benefit people who have suffered from a form of discrimination
- ▶ Will stand to challenge a **federal** law or action

## Format for Application to Court Challenges Program



### Check list for application letter:

- ▶ Collect all the information about your case
- ▶ Organize the facts in a logical and coherent manner
- ▶ Include who is involved in your case or project and what role they play
- ▶ State the law, policy, practice or issue your case or project is about
- ▶ For legal cases, state the position of the other party[ies] involved, the evidence that you will produce, and what you intend to ask the court to do
- ▶ Give a description of why you think the case or project is important
- ▶ Provide copies of important documents
- ▶ Detail the budget
- ▶ Provide a workplan
- ▶ Include contact information for both your lawyer and yourself
- ▶ Submit the application to:

**Court Challenges Program of Canada**

**616-294 Portage Ave.**

**Winnipeg, Manitoba, R3C 0B9**

Phone: **1-204- 942-0022**; Fax: **1-204-946-0669**, or E-mail: [info@ccpcj.ca](mailto:info@ccpcj.ca)

## **2. Understanding Legal and Legislative Advocacy**

### **Goals:**

- ▶ To introduce participants to Legal and Legislative Advocacy
- ▶ To be able to develop an Action Plan that incorporates the legal process

### **Rationale:**

Participants need to familiarize themselves with the legal system, both as a system of change and as an effective support toward self-advocacy. Legal and Legislative Advocacy requires commitment and perseverance on the part of many.

### **Tools:**

Flipchart, markers, pens, and paper.

### **Method**

#### **Warm Up:**

It might be useful to recap on information provided at the beginning of the Workshop (Section Two: Module One) concerning the definitions of Legal and Legislative forms of Advocacy.

#### **Legal Advocacy . . .**

Includes the use of attorneys and the court system to establish or protect the legal rights of all persons.

## **Legislative Advocacy is . . .**

Using the legislative process to mandate change in the social system in order to secure the rights of persons with disabilities.

Have the group brainstorm equality issues relating to persons with disabilities that may have been in the press over the past year: these might include the Tracy Latimer case, proposed changes to the Canada Pension Plan and its impact on persons with disabilities or, on the issue of gender, a woman's fight for exemption from paying taxes on the child support payments from her children's father. Although these issues may raise some heated discussion, keep the group focused on the way that these court cases promoted equality rights. Even if the case is unsuccessful in a court of law, the issue of public awareness and debate can and will affect the outcome of other cases.

### **Exercise 1**

Hand out copies of the Nancy Green story. Divide the participants into groups of four and have them discuss what they would do under similar circumstances. Have the participants refer to the handout on the Advocacy Process (Section Two: Module Five) as they work on an Action Plan. Make sure that each group maps out an Action Plan on a piece of paper and elects one member of the group to act as a spokesperson for that group. The facilitator and his or her assistant may want to circulate among the groups to remind the participants that there is no right or wrong Action Plan--that each Action Plan stems from available choices.

Bring the participants back together. Support each spokesperson to make his or her presentation to the large group. Comment on facts presented as well as the way that the spokesperson presented these facts. Make sure you provide positive feedback for

lessons learned.

You may want to end the discussion with the outcome of the Nancy Green case, which is described in the handout.

## **Discussion**

### **Questions for Consideration:**

- ▶ What is Nancy's major issue?
- ▶ What is the biggest problem that Nancy is facing?
- ▶ Who should Nancy approach for support?
- ▶ What options are available to Nancy?
- ▶ When can Nancy expect to see results?

## Nancy's Story<sup>11</sup>



Ms. Nancy Green lives in Ontario. She has a learning disability. She works with the Public Service Commission and, in spite of finishing first in a job competition, her name was left off an eligibility list for promotion, because she has auditory dyslexia.

She was informed by her employer that she did not have the required aptitude to learn French. She feels that her employer does not understand her learning disability and, as a result, will not make an adequate effort to accommodate her disability.

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<sup>11</sup> Based on information obtained from the *Canadian Human Rights Commission* (*Commission Canadienne Des Droits De La Personne*), July 1998; on-line: CHRCHRPB/DPDP: No. 173

**Note to Facilitators:**

If participants are still having difficulty understanding some of the implications of Legal Advocacy, you may want to bring in a lawyer to lead a round table discussion on disability and the law. If there is an Equal Justice for All advocacy group in your area, arrange for a speaker.

**Evaluation:**

Review the Court Challenges Program and discuss its benefits in regard to Legal and Legislative Advocacy. Remind participants that these processes can be long and arduous, that the ultimate choice as to how far a process should be taken rests with the person with the disability.

Use this time to reflect on what the participants have managed to learn to date. Reflect back on the Contracts they have made, the Affirmations they have recorded and rehearsed, and the work they have done as a group. Make sure you praise every step, never mind how small.

**Lead in to Next Module:**

Make sure the participants revise the material learned to date. Have them think about advocacy situations they may want to rehearse in the safety of the group.

## *Outcome: Nancy Green Story<sup>12</sup>*

In Ottawa, on June 29, 1998, a human rights tribunal ruled in favor of Nancy Green, who said she had been discriminated against because of a learning disability.

She had filed a complaint with the Canadian Human Rights Commission against the Treasury Board (TB), the Public Service Commission (PSC), and Human Resources Development Canada (HRDC) alleging she was denied a promotion because she has auditory dyslexia.

In its decision the tribunal stated that the TB and PSC totally failed to accommodate Ms. Green's disability, even when she had succeeded in obtaining French language training on a part-time basis and raising her knowledge to a level which might have given her a "positive prognostic." It would seem, they stated, that part of the trouble lay with the "hierarchical nature of the federal civil service and problems with communication."

The tribunal ordered that Ms. Green be appointed immediately to a position at the level of the position she was originally denied and that she be further appointed to an executive level without competition, at the first opportunity after she complete management training and full-time French language training.

She received a lump sum compensation of 69,895.25 dollars for lost wages, continuing monthly compensation for 825.66 dollars from January 1998 to the date of the decision, and special compensation of 5,000.00 dollars for hurt feelings.

An education and training program will be developed to inform HRDC and PSC personnel of accommodation strategies for persons with disabilities.



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<sup>12</sup> Based on information obtained from the **Canadian Human Rights Commission** as noted earlier.

**Section Two**  
**Module Eight: Theory into Practice**  
**Effective Advocacy and Government Agencies**

**Key Considerations:**

When we have a complaint or an issue that we want to resolve, it can be time consuming and frustrating when we have problems connecting to the right person in a government agency. This module is loaded with scenarios that present the participants with numerous options on how to proceed with advocacy situations that may have arisen in the past (that can be revisited) or may arise in the future. More than anything else, this is a step by step method on policies that are in place by various government agencies. They may seem long and detailed, but they can ultimately save time on research and failed responses. Too many of us have been told, “I’m sorry, you have come to the wrong place. We can’t help you with that.”

**Social Services**

If you have a problem regarding social assistance, it is advisable to develop a paper trail to support your claim.<sup>13</sup> You should:

- ▶ Write a letter to your case worker clearly stating your complaint, the facts surrounding that complaint, and the type of response you want from the worker. Include your file number and contact phone number in the letter. Keep a copy of the letter!
- ▶ If, after seven days you receive no response, write another letter to the worker’s

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<sup>13</sup> Information provided by Equal Justice for All, Saskatoon, SK.

supervisor repeating the complaint. Attach a copy of the letter you sent to the case worker. Keep a copy of the letter!

- ▶ If, after another seven days, you receive no response, write another letter to the Director. Attach a copy of the letters sent to the case worker and the supervisor. Keep a copy of the letter!
- ▶ If, after seven days you receive no response, begin the appeal process.

**Remember:**

**Most cases can be resolved at the case worker and/or supervisor level.**

The final decision to appeal is always the decision of the person with a disability. Before undertaking such a move, he or she must feel that the appeal has merit. There are three questions to consider in considering an appeal:

- i. Were any of the **facts** or evidence used to make the original decision incorrect or inaccurate?
- ii. Did the person who made the original decision jump to conclusions or make inferences from the information you provided?
- iii. Did the person who made the original decision make an error in applying the correct regulation?

If, when you gather the material to test whether you have grounds for an appeal, your evidence appears weak, realize that the Appeal Board may feel the same way. This does not mean that you should only advocate an appeal if you feel you can win; you must be able to persuade or argue your point of view in a convincing manner. If you still feel you have a strong case, you may want to have someone else assist you in the appeal or advocate on your behalf.

## **What can be Appealed?**

In general, an individual or family may appeal any decision which affects their right to receive assistance, or the amount of assistance received. This includes circumstances when and

- ▶ If the application for assistance is denied
- ▶ If your assistance is withheld or terminated
- ▶ If the amount of assistance received is changed
- ▶ If the amount of assistance received is not enough to meet your needs
- ▶ If a request/claim for special needs funds is denied
- ▶ If you are faced with a decision that you have received an overpayment
- ▶ If there is a decision you are living in a common law relationship
- ▶ If you receive any treatment from your worker that you feel is unfair

The local Appeal Board is made up of three people who represent the community and who are appointed by the provincial government. While they are paid an amount the day that they hear the appeals, they are not employees of the provincial government.

## **Advocacy and Overpayment of Social Assistance**

You must be notified in writing of the amount of the overpayment and the reason the overpayment has been assessed. Before beginning an appeal process, try to work things out with the case worker and/or supervisor. Remember:

- i. If bills are required as evidence, provide duplicates.
- ii. If letters of confirmation are required, collect them well in advance and keep copies.
- iii. If original bills are lost but proof of expenditure is required, obtain letters to

confirm the purchases.

- iv. If unreported income has been spent on anything which might be considered special needs, discuss with your worker if this amount can be deducted from the overpayment. Provide bills to support the claim.
- v. Write a letter to request that the amount of money recovered monthly be reduced and the reason for the request (usually hardship).

You may appeal:

- I. The decision that there is an overpayment.
- II. The total amount of the overpayment.
- III. The specific amount that is recovered from your cheque each month.

### **Advocacy and Special Needs Funding**

Special needs funding can be a complex process. Special needs funds are an allowance for needs not covered by basic benefits and do not have to be repaid to the social services department.

#### **Examples of Special Needs Funds:**

- ▶ **Clothing**, such as maternity and baby clothing; special goggles or boots to start a job
- ▶ **Medical costs**, such as those related to special dietary requirements
- ▶ **Disaster replacement** due to flood or fire
- ▶ **Travel costs**, such as transportation to take a child with a disability to school; to attend medical treatment; to attend a funeral of an immediate family member
- ▶ **Child care expenses** if, for example, someone is sick or disabled, or to ensure that a parent can attend a rehabilitation program

- ▶ **Education:** there is a set amount per annum to purchase school supplies;
- ▶ **Household** repairs, such as personal property repairs for reasons of health or safety
- ▶ **Funeral costs**

There are ten steps to the Social Assistance Appeal Process. Please refer to the Theory Box for more information.

### **Theory Box: Social Assistance and the Appeal Process<sup>14</sup>**



1. You must write a letter to your worker outlining the facts of the case. The worker then makes a decision based on the facts as she or he knows them and the policies of the department.
2. Within 45 days of receiving a written notice of the worker's decision, you must send a written form or letter to the local Director.
3. The Director will review the case and, if he or she agrees there has been an error, he or she will arrange for a local Appeal Board hearing.
4. Within 20 days from the day they receive the notice of appeal, the local Appeal Board will set a date to hear the appeal and will notify you of your right to have an advocate present.
5. At the hearing, you will be asked to present your evidence to the Board; you may be asked questions by a government representative. You and any witnesses that you may bring can also be asked questions from those present.
6. The local Appeal Board will inform you of its decision in writing providing its reasons for the decision and informing you that you have the right to appeal this decision at a provincial social services level.
7. You have 20 days to respond to this letter by writing to the provincial board. The letter must include the same type of information you offered at the local level. It must be sent to the Director of Social Services for your region.
8. Within 30 days, the provincial Appeal Board must set up a hearing. You will receive notice of this hearing at least 5 days before the hearing date.
9. The same process applies at the hearing as at the local Appeal Board level.
10. You will receive the final decision in writing.

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<sup>14</sup> Adapted from *The Advocate's Handbook*, Catholic Family Services, Saskatoon

## **Working with Advocate Supports**

### **Goals:**

- ▶ To understand the process of working alongside advocate supports
- ▶ To understand the advocacy process as it relates to presenting persuasive arguments to government agencies

### **Rationale:**

It is important for participants to understand that there are support systems available to enable them to reach their goal. Working in cooperation with some of these supports is more beneficial than working against them. Sometimes, persons with disabilities feel pressured by a family member or a worker to give total control to the worker, the trustee, or the family member. Participants can learn the team approach, realizing that the final decision is always up to the person with a disability.

### **Tools:**

Flipchart, markers, pens, paper, dictionary, table and seating for “Appeal Board” (Video Camera is optional).

### **Method**

#### **Warm Up:**

Start by revising some of the Forms of Advocacy from Section Two: Module Two. These should include

### **A Case Manager . . .**

assists the individual in information, referral, and follow up services. He or she may serve as an advocate when there are barriers to the service delivery system.

### **Consumer Action Advocates are . . .**

groups of parents or adults who have a disability that act as pressure groups to influence groups and advocates toward desired change.

### **Community Organization Advocacy . . .**

entails using the community organization process to develop better communication among agencies serving persons with disabilities; to assist in the development of cooperative or coalition efforts on behalf of persons with disabilities by public and private providers of service as well as consumers.

Invite some of the participants to share incidences when they have approached government agencies for different forms of support. Some of these incidences might be difficult and painful to share with the group. The goal is to chart the **facts** surrounding these incidents and have the participants explore options that may have led to different, even more productive outcomes. Remind the participants that they are now more informed on policies and procedures. The facilitator may want to use the example provided. List the facts of the case on the flipchart and have the group devise an Action Plan. If the case demands that a letter be written, divide the group into groups of three and have each group compose a letter. Refer the participants to the format for writing advocacy letters outlined in the module on Effective Communication (Section Two: Module Six). Ask for a spokesperson from each group to read the letter aloud to the large group. Start out by describing what is effective about each letter and move into

ways of stating valid points in a clearer and more organized way.

**Example:**

- ✓ Deanna, who has just been diagnosed with Multiple Sclerosis, has fibromyalgia. She is on social assistance and lives in a government subsidized apartment building. She wants to move out of her apartment into another apartment in the same neighbourhood, because she is being continually harassed by her neighbour, a lady who drinks excessively. She is afraid to leave her apartment, because her neighbour is verbally and physically abusive toward her. The neighbour has pushed her down some stairs on the way to the laundry room and knocked her and another tenant (who came to Deanna's aid) to the floor. Deanna can hear screams and loud music emanating from her neighbour's apartment at all hours of the day and night. When she informed her case worker, who is new to her case, she was told to avoid her neighbour as much as possible, because she could not be moved again. She had been moved into this building four months ago following her request to move from a different apartment, which was in an unsafe neighbourhood. Deanna is depressed and doesn't know who to turn to. She wants to get a job as soon as possible to get some money to move out of her apartment. She calls a Career Development Facilitator at the local IL Centre to ask the facilitator to help her find employment. The stress of trying to avoid her neighbour is aggravating her medical condition.

## **Discussion**

### **Questions for Consideration**

- ▶ What is Deanna's major problem?
- ▶ What options are open to Deanna?
- ▶ Is a job a solution?
- ▶ What groups or organizations are available to support Deanna?
- ▶ What should Deanna do first?
- ▶ Does she have a back up plan?

### **Possible Plan of Action**

1. The major problem is the behaviour of the neighbour. It might be easier to have the neighbour removed rather than have Deanna move again.
2. Deanna could ask the tenant who was physically assaulted at the same time as she was to write a statement supporting the fact that both she and Deanna were assaulted by the neighbour. She can approach other tenants who live on the same floor (and the floor above and below) as the neighbour to find out if they have similar problems with the neighbour. She could ask them to go with her to present this information to the landlord/worker; if they refuse to go with her, she should ask for letters of support to have the neighbour evicted, or at least warned about her behaviour.
3. Deanna should meet with one of the staff at the IL Centre, who could help Deanna put things into perspective and provide information about support groups at the local Multiple Sclerosis Society office. The facilitator could advocate on Deanna's behalf with the case worker.
4. Deanna should make an appointment to see her doctor to get a letter to confirm the impact of this situation on her health.
5. When all the letters are in hand, Deanna could write a letter to the case worker to ask

for the neighbour to be evicted, or at least be given a warning, remembering to include copies of all the evidence discussed to date.

5. She could then make an appointment with the worker to deliver the letter in person. She may want to take supports, like the tenants, a peer, or the IL representative with her.

6. She should wait seven days and, if there is no response, write a letter to the worker's supervisor.

8. Deanna would benefit from attending the next Self-Empowerment Workshop at the IL Centre.

9. Deanna should be informed that she can discuss issues surrounding employment with the IL centre's Career Development Facilitator when her home and health situations are more stable.

**Note to Facilitator:**

This case scenario is based on an actual incident. When the tenants of the building were approached for information on the neighbour, it became evident that the neighbour had assaulted quite a few of the tenants and that the department had a paper trail of evidence to support this. The IL Centre staff helped Deanna compose a letter to the case worker, who, after further investigation, then informed Ms. Kincaid that she had a month to vacate the premises.

## Sample Letter to Deanna's Case Worker

# 301 224 Broadway Ave.  
Saskatoon  
SK A2B 3C4

August 1, 1998

Ms. Bernice James  
Case Worker  
Department of Social Services  
#111 16 River View  
Saskatoon  
SK 4G7 4S8

Dear Ms. James,

Re: Deanna Popowich  
File Number: 11223344

Further to my phone call to your office on July 10, 1998, I would like to inform you of the intolerable circumstances surrounding my present living conditions at the above noted government subsidized apartment complex.

In the four months that I have lived at the above apartment, I have been continually harassed and, on one occasion physically assaulted by Ms. Kincaid, who is a tenant in the above apartment building (Apartment # 305).

On July 8, 1998, at approximately 11:00 a.m., Ms. Kincaid, who appeared to be intoxicated, came out of her apartment and pushed me down some stairs as I was walking along the hall to the laundry room. When another tenant who was leaving the laundry room came to my aid in picking up the laundry that fell from my basket onto the floor, Ms. Kincaid pushed both of us against the wall shouting that we were in her way. We had done nothing to aggravate Ms. Kincaid.

As a person who has fibromyalgia and Multiple Sclerosis, I am unstable on my feet. At best, I have difficulty keeping my balance, especially if lifting and carrying is involved.

I enclose a copy of a statement written by Ms. J. Holland, who was the tenant who came to my aid on July 8, 1998. As you will note, she was also assaulted by Ms. Kincaid.

I also enclose copies of letters from five other tenants in the building who have been verbally or physically assaulted by Ms. Kincaid. They also note that Ms. Kincaid appears to be intoxicated most of the day and that, despite attempts to approach her about the noise that emanates from her apartment at all hours of the night and day, she continues to create a disturbance. They inform me that they have approached the Department of Social Services about Ms. Kincaid on at least five other occasions over the past year (a copy of one letter of complaint from Mr. Douglas Sinclair to the Department is attached).

I find that I am confined to my apartment because of Ms. Kincaid's unpredictable behaviour. I have been advised by my doctor that this type of stress serves to aggravate my medical condition. I have been depressed and the pain in my lower limbs is getting worse. Please see the attached letter from my doctor; this confirms the increase in my pain medication, commencing July 12, 1998.

My initial request to you was to be moved to another apartment; if this is not possible, then I would ask that you speak with Ms. Kincaid about her behaviour or have her moved to alternate accommodation.

I look forward to a response. I can be reached at (306) **887 3322** if you require any further information.

Sincerely,

*Deanna Popowich*

Deanna Popowich

c.c. Sue Smith, Facilitator, North Saskatchewan Independent Living Centre

encl. Letters from tenants

Letter from Ms. J. Holland

Letter from Dr. C. Klein

## **Appeal Board Hearing**

### **Goals:**

- ▶ To be able to advocate on one's behalf in front of one's peers
- ▶ To be able to gather resources required for the appeal
- ▶ To be able to choose the degree of involvement/participation in the appeal process

### **Rationale:**

This is a good time to put lessons learned into practice. **The Appeal Board hearing can take place in a safe environment, where the only risk involved is being prepared enough for the final performance.**

### **Tools:**

Flipchart, pens, paper, library/computer access, video camera (optional), facility to hold the mock hearing.

### **Method**

#### **Warm up:**

The facilitator and his or her assistant may want to review the Social Services Appeal Board Process as well as the handout on the Art of Persuasion on the flipchart before the groups begin work on each of their scenarios.

#### **Exercise 1**

This exercise can act as a finale to the Workshop. The facilitator and his or her assistant should set the stage for an "Appeal Board" hearing. Divide the participants up into manageable sized groups. Each group is to role play an "Appeal Board" hearing. The facilitator can provide some scenarios of his or her own creation or choose some from

the examples provided.

Each group is to decide who will play each part in the scenario. A member from each group may choose to play the person with a disability who is at the centre of the case, or the person who advocates on behalf of the person with a disability, or a witness for the case. Make sure that each member of the group contributes to the role play in some way: one can compose the letters, another can be responsible for observing and guiding participants' body language responses, and another person can be responsible for the seating arrangements and order of presentation, and so forth. The intent is for the group to work as a team to develop a sound case for the hearing. The facilitator can arrange for the group to prepare and rehearse their cases in specially allotted sessions or meet outside of the group, such as over a lunch hour. On the day of the "Appeal Board" hearing, they are to dress and conduct themselves accordingly.

**Note to Facilitators:**

The facilitator may want to spend at least thirty minutes with each group as they prepare the facts for the case. Make sure that the facts are clear, logical, and ordered in a persuasive manner. The group may decide to send a member to the library and/or use the computer to access information on government policies. The group may want to meet outside of the sessions to discuss strategies, role play, or write up data. Remind each group that they can choose not only the scenario that they feel is relevant to the group, but also choose their degree of involvement in the final performance.

The facilitator will bring in an "Appeal Board" panel which will consist of a person with a disability, an executive director from a community-based organization, and a social worker or government representative or lawyer. The panel will be given some

basic information regarding each case the day before the hearing in order to prepare. They will participate in the hearing and consult with the facilitator at the end of the day. The facilitator can then write up the responses for each group for delivery the following day. It is understood that the panel will be sensitive to the anxiety of the participants.

The participants can be invited to observe each group's presentation. Some may prefer to rehearse their own scenario instead. If available, the facilitator may want to ask a volunteer to video tape each hearing and play the entire tape back to the large group the next day (preferably before the Appeal Board responses are delivered). Participants can then learn from their peers and provide constructive feedback on the overall appearance, argument, and powers of persuasion of each group. No one really likes to observe themselves on camera. It is important to provide positive feedback to participants whenever possible. For example, comment on how one participant has learnt to hold effective eye contact and speak in a more assertive manner over the course of the Workshop, or comment on how another participant speaks in a more audible manner than at the beginning of the Workshop.

### **Note to Facilitator:**

The Theory Box on Facilitators Notes to Role Play Scenarios list possible defence strategies for each group to adopt at the hearing. The information serves as a guide to your discussions with the small groups rather than absolute responses. The small groups may come up with innovative approaches of their own.

### **Evaluation**

Review the material in a way that reinforces how the participants were able to put

knowledge into action. Comment on how collaboration allows for success. There were no failures in the Appeal Board hearings, because each person not only controlled the role he or she played in the scenario, but also contributed to the best of his or her ability. Remember to start off the final discussion on what was positive about the role play and guide the responses to be critical rather than judgemental in nature.

## Advocacy and The Art of Persuasion<sup>15</sup>

In general, there are three elements to the art of persuasion:

- ▶ The language you choose
- ▶ The skillful use of facts
- ▶ The logic of the arguments you construct from the facts



### The Language you Choose

The choice of words you use should be based on what will convey your ideas most effectively. This does not mean that you need to use three syllable words in long, complex sentences. Words must be clear and precise. A dictionary can be used to ensure that the word you use communicates exactly what you want to say. Positive language conveys openness rather than hostility. Negative language will not capture your listener's undivided attention. Remember, this is your case, so the language has to be your own.

### The Skillful use of Facts

You may be a brilliant speaker, able to voice your opinions in an assertive manner, but without facts to support your argument, the Appeal Board will not be impressed. Facts can be found in:

- ▶ Reports submitted to the Department
- ▶ Receipts
- ▶ Government documents like policy regulations
- ▶ Your file

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<sup>15</sup> Adapted from *The Advocate's Handbook*, Catholic Family Services, Saskatoon, SK

- ▶ Letters you have written or collected concerning the case
- ▶ Information shared through community advocacy groups
- ▶ Professionals such as doctors and lawyers
- ▶ Witness reports

List the facts and then write them down in order of importance; include only those that best support your argument.

### **Logic**

The more reasonable your argument seems the more likely you are to convince others that you have a valid point. People reason in one of two ways:

- ▶ Inductively or
- ▶ Deductively

Deductive reasoning begins with a general statement and then offers supportive evidence to support the general statement. Inductive reasoning is the opposite process. It begins with specific examples and ends with a summarizing statement.

### **Do not:**

- ▶ Over-generalize or draw a conclusion based on little evidence. For example, “my daughter found a job within days of school breaking up for the summer, so all students should find it easy to find a summer job.”
- ▶ Talk in circles or repeat a statement of fact instead of expanding on it. For example, “I have a medical problem so I need a special diet.” or “I want the money to buy food for my special diet.” It is more productive to specify the medical problem, list the dietary requirements, and provide a doctor’s letter to

support the diagnosis and dietary request.

- ▶ Jump to conclusions by determining that one fact logically follows another. For example, “Mr. Smith suffers from a lot of health problems so that is why he chooses to work out of his home.” It may well be that Mr. Smith watches the children so that his wife can work out of the home.
- ▶ Put ‘holes’ in the argument by allowing emotions or personal feelings to get in the way. For example, “my case worker doesn’t like me, so I got stuck with an overpayment.”
- ▶ Ramble on about thoughts and ideas that are not connected to your argument. For example, “Jim is a good son; he just doesn’t listen much in school. He needs this program. If only teachers would pay as much attention to him as I do.”
- ▶ Contradict yourself. This confuses listeners. Review your notes and have someone proofread letters. For example, “I think that proper housing is essential to my well being. I don’t care where I live as long as I have a proper diet.

### **Summary:**

- Take in notes that are clear, accurate, and concise.
- **Present the facts and nothing but the facts.**
- Be ready to respond to questions in the same manner.
- Don’t be afraid to ask to have the question repeated or clarified if you are not sure what they mean.
- Think your argument through

## **Sample Scenarios for the “Appeal Board” Hearing**

### **Scenario 1**

Jenny has fibromyalgia and lives on social assistance. Jenny is a paraplegic who uses a wheelchair. At present, treatment of her condition is limited to pain management. During her last doctor’s appointment, her specialist recommended some private physiotherapy and massage treatment. Knowing that these services are not insured, Jenny phoned her social worker to ask if she could get special needs funding to cover the cost of these treatments. The request was denied on the grounds that the Social Assistance Plan regulations do not provide for such types of funding. The Worker suggested Jenny contact the Department of Health.

After finally reaching the Department of Health, she is told that this Department is authorized to pay for physiotherapy services as outlined in their regulations. These payments are set by the Minister of Health and the Sask. Physical Therapy Assoc. However, private practitioners set their own rates and are not covered by the Department. Jenny doesn’t know what to do.

### **Discussion**

#### **Questions for Consideration:**

- ▶ What is Jenny’s major problem?
- ▶ What are her options?
- ▶ What will she need to collect as evidence for the Appeal Board hearing?

## **Facilitator's Notes to Appeal Board Scenarios**

### **Scenario 1: Jenny's Case**

Suggest the group review the Department of Health Policy and Regulations on file at the main library and seek out members of the community familiar with the regulations that may be able to help. They will find that under the regulations there is SOME discretion allowed to pay for private services for persons on social assistance.

However, the group must CLEARLY demonstrate the UNIQUE REASONS why private rather than public services are required.

Jenny will need to compose a letter outlining her need for these services and the unique reasons why she deserves financial assistance for this claim. Make sure supportive evidence (verbal or written) is provided by the general practitioner, physiotherapy clinic, massage specialist, etc. Witnesses could include the general practitioner and the therapists.

The **key** to the success of this case: What the group offers as unique circumstances.

### **Scenario 2: Jim's Case**

Jim's condition is so weak, he may prefer to have someone advocate on his behalf.

The advocate should provide evidence that the dietary supplement is not a food replacement but in addition to his daily dietary requirements. Evidence for this can be supplied by the doctor. Copies of the prescription must be provided. Have the group review the Social Assistance Policy and Regulations or ask an agency familiar with the policy if the supplement can be covered under "Special Needs" funding. Maybe one of Jim's peers who is HIV positive and receives the "Special Needs" funding can appear as

a witness to confirm this fact. In the interim, Jim needs to be issued with emergency funds to buy some food.

The **key** to the success of this case: the ability of the group to persuade the Appeal Board of the “Special Needs” funding.

### **Scenario 3: Millie’s Case**

Millie needs support to vent her feelings. As it stands, her emotional state is clouding her judgement. The facilitator can provide the support Millie needs as she formulates an Action Plan and composes letters. Millie needs to write letters, keep copies, and collect evidence, including receipts for transportation costs, including cost of repairs to her scooter, taxi costs, etc. She needs a doctor’s letters to confirm her medical diagnoses and dietary requirements. She needs evidence to support the rationale for past amounts of money received. She needs to uncover the rationale for the overpayment before she goes into the hearing. She should not attend the hearing alone.

The **key** to the success of this case is the argument that her condition has not altered substantially to warrant the changes indicated in the latest cheque. She has a good case to reinstate her travel allowance and “Special Needs” funding.

## Sample Scenarios for the “Appeal Board” Hearing

### Scenario 2: Jim’s Case

Jim receives a letter from his social worker informing him of an overpayment of 200.00 dollars. His next cheque indicates this overpayment as being related to a move he has just made into a smaller, more affordable, apartment that puts him within walking distance of the hospital. Jim is HIV positive.

Jim is very thin and weak. His doctor has prescribed a special high nutrient food supplement for him to take. Jim phones the social worker to ask if he can get “Special Needs” funding for the dietary supplement. His request is denied on the grounds that his food allowance is enough to cover his dietary needs. Jim feels that, with the added 60 dollars deducted for the overpayment, he cannot afford to fill the prescription.

### Discussion

#### Questions to Consider:

- ▶ What is Jim’s major problem? Is it the overpayment, the need for “Special Needs” funding, or both?
- ▶ Who can Jim approach for support?
- ▶ What can Jim do about the overpayment?
- ▶ If the choice is to document evidence in a letter, what should be specified and in what way?

## Sample Scenarios for the “Appeal Board” Hearing

### Scenario 3: Millie’s Case

Millie has cerebral palsy and irritable bowel syndrome. She uses a scooter to assist her with mobility. She has just completed a 4 month employment training program and has just commenced a work placement that she hopes will turn into permanent employment. She has a new social worker who called her to say that she was reviewing her case.

Millie’s next social assistance cheque notes an overpayment of 500.00 dollars, a withdrawal of her “Special Needs” funding, and a deduction in her travel allowance. She turns up at the IL Centre to inform the Facilitator that she was going to quit her job. She refuses to speak to her worker ever again. She is shouting and insulting to anyone who comes into the office.

### Discussion

#### Questions to Consider:

- ▶ What are the main points concerning Millie’s case?
- ▶ What are her options?
- ▶ Would it be more profitable to have someone advocate on Millie’s behalf? If yes, what are the reasons?
- ▶ What evidence should Millie collect?
- ▶ Who should speak as witnesses?

**Evaluation:**

**These are scenarios that can be explored in different ways. It is important to stress that the consumer has the final choice on which direction to take.** For example, in some cases, a phone call and a letter may suffice. Other consumers may opt to go no further than a meeting with the social worker or another advocate.

## **Final Evaluation and Wind Up**

The Workshop has brought together persons with disabilities that have learnt to share knowledge, ideas, and dreams. It is important that each participant has been recognized for his or her uniqueness. In a round table discussion, invite the group to share some of their feelings and experiences about the Workshop. Some participants may want to discuss future goals, while others may feel a sense of disappointment. It is likely that participants will support each other, but the facilitator should be prepared to offer some examples of positive experiences shared by all participants.

### **Remember:**

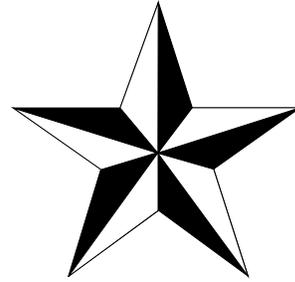
There are no mistakes, just discoveries.

Author Unknown

This is a time for celebration!

Participants should be invited to complete Evaluation forms for the Workshop. This information is invaluable in expanding upon or revising some of the modules for future Workshops.

## Evaluation: Self-Empowerment Workshop



Name: (Optional)

1. What did you like the most about this Workshop?

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2. What did you like the least about this Workshop?

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3. Do you feel that the facilitators were sensitive to your needs throughout this Workshop? If your answer is no, what could they have done to make you feel more comfortable?

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4. Would you recommend this Workshop to others? If not, why not?

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5. What particular skills learnt in this Workshop do you think you will take with you into the community/apply to everyday life?

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6. Is there anything you want to add that we have not asked you about the Workshop?

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Thank you for you participation in the Workshop and in the completion of this evaluation.

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