

# **Illawarra Citizen Advocacy**

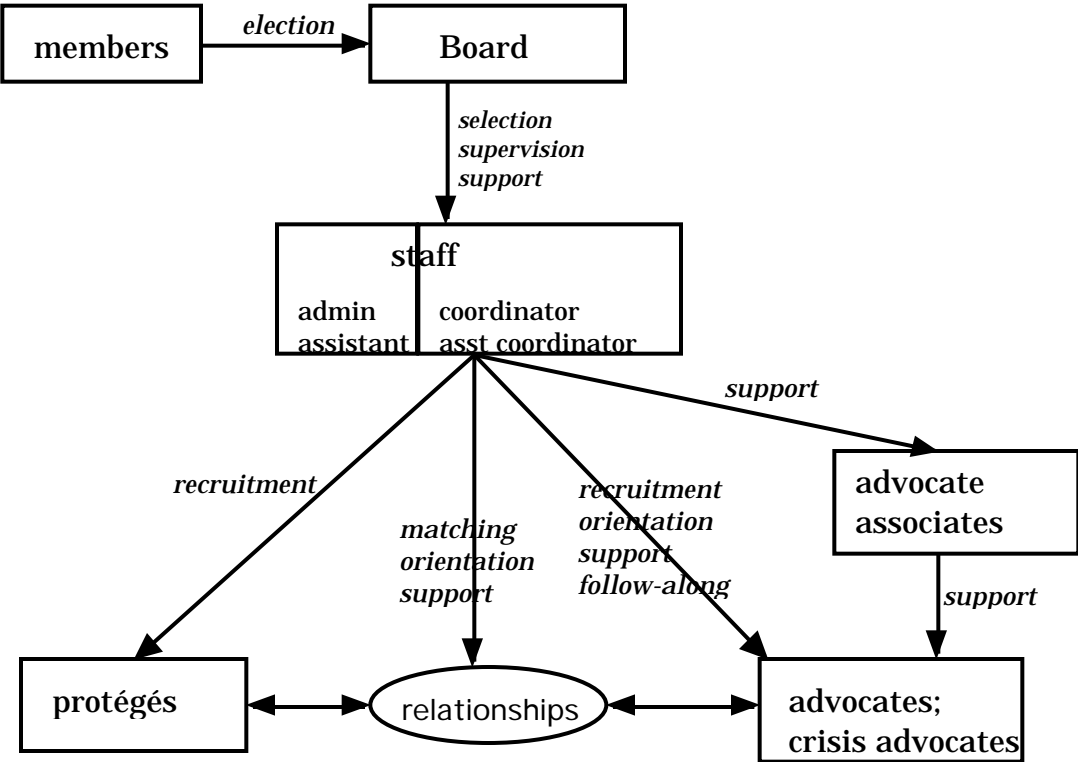
## **Board of Management Roles and Responsibilities**

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Page 16 is not yet available electronically.

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# Diagram of the structure of Illawarra Citizen Advocacy Inc.



## **THE BOARD OF MANAGEMENT**

The National Citizen Advocacy Seminar, held in Sydney in 1993, focused on the Board of Management's role in a Citizen Advocacy programme. Throughout the seminar the guest speakers, Mr AJ Hildebrand and Professor Zana Lutfiyya, emphasised the importance of commitment from board members to the success of a Citizen Advocacy programme. The Board of Management role of a Citizen Advocacy programme is unlike other boards because of the necessary personal involvement and cost to board members. The board takes ultimate responsibility for the Citizen Advocacy programme and, therefore, the members must be conscious and knowledgeable of the CAPE (Citizen Advocacy Programme Evaluation) standards upon which the Citizen Advocacy programme is based.

Citizen Advocacy is clearly defined by a set of values and principles and a description of practices. These provide the foundation for the implementation and on-going decision making of the programme.

The Board meets monthly with the staff to manage and administer the programme and to assist and advise the Citizen Advocacy office staff in their implementation and practice with the values and principles of Citizen Advocacy.

Citizen Advocacy has no sectarian or political affiliation and is motivated only by the desire to make a positive difference in the lives of some of our community most disadvantaged and vulnerable people.

The Board of Management is therefore responsible in providing the essential knowledge, leadership and support to enable the Citizen Advocacy principles to be put into practice. This is necessary if Citizen Advocacy is to be firmly established and continue to grow and develop within our local community of the Illawarra.

## **PROSPECTIVE BOARD MEMBER LEARNING PROCESS**

When a community member wishes to join the board, we will try to arrange that the prospective board member will .....

- \* Meet and spend time with all board members prior to coming on board.
- \* Meet with the Co-ordinator and a board member a number of times to have discussions related to Citizen Advocacy.
- \* Attend several board meetings.
- \* Meet people with intellectual disability who are already involved in Citizen Advocacy.

## **EXPECTATIONS OF AN ILLAWARRA CITIZEN ADVOCACY BOARD MEMBER**

### **Attendance/Participation**

- Attend monthly board meetings (currently held on the second Tuesday of the month, 6.00-8.30 at the Citizen Advocacy office)—*expected*
- Participate in a planning day once per year—*expected*
- Participate in workshops/seminars relevant to Citizen Advocacy—*desirable*
- Be part of a sub-committee of the board—*desirable*

### **Self-development**

- Acquire knowledge of Citizen Advocacy's aims and principles via orientation and reading, and attending a board training day—*expected*
- Keep up to date with what is happening in the programme by regular contact with staff—*expected*

### **Support and Leadership**

- Support staff in the implementation of Citizen Advocacy principles—*expected*
- Provide leadership and direction for the programme—*desirable*
- Develop local policies and priorities—*desirable*
- Assist staff with recruitment of advocates by using local connections—*desirable*

### **Outreach**

- Foster awareness of Citizen Advocacy among friends, co-workers, community groups and the media—*desirable*
- Attract new members—*desirable*
- Build support (including financial support) for the programme from individuals and organisations—*desirable*

## **OVERVIEW OF RESPONSIBILITIES OF THE BOARD OF MANAGEMENT**

**The overall role** is to oversee the operations and activities of the organisation to make sure it fulfills its principles. This includes the smooth operation of the management group.

**Legal** responsibilities include meeting the requirements of a range of federal, state and local government laws and regulations. Examples are: incorporation, insurance, permits, licences, copyright, defamation, occupational health and safety, awards and taxation.

**Financial** responsibilities are to ensure that there are adequate funds for the operation of the organisation, that the organisation works within the limits of these funds and, that records are kept and funds accounted for. The following things need to happen: development of a funding strategy, obtaining funds, drawing up budgets, monitoring expenditure, bookkeeping, financial statements and audits, negotiation funding and service agreements, reporting on the use of funds.

**Personnel** responsibilities begin with designing jobs, developing job descriptions, through to staff recruitment, training, supervision and support, discipline and dismissal. They include occupational health and safety issues and the development of employment policies.

**Premises** and **equipment** responsibilities mean ensuring that the premises, facilities and physical resources are provided and maintained so that the services can be provided properly and safely.

**Planning** and **policy** responsibilities involve making sure that the guidelines and framework are provided for everyone in the organisation to know where it is headed, what it aims to achieve, and how each job fits into the overall plan.

**Promotion** and **marketing** responsibilities concern raising awareness and publicising the organisation, its aims, its services and its achievements. The credibility of the organisation with founders, policy makers and the wider community will depend on how well this is done.

**Reporting** and **accountability** responsibilities are to inform and involve people with a disability and members of the wider community. Founders and policy makers also need to be kept informed about the organisations and its achievements.

## **EXAMPLES OF WAYS FOR BOARD MEMBERS TO HELP**

### **FINANCIAL**

- \* Help raise \$1000 (or more) towards operating expenses.
- \* Find a corporate sponsor for office supplies.
- \* Write appeal letters to raise funds.
- \* Help organise a fund raising event.
- \* Distribute literature (brochures, donor option forms, at your place of employment, church, club, etc.).
- \* Make a personal financial contribution.
- \* Approach a business, church, organisation for a contribution.
- \* Ask friends and associates to contribute financially.

### **RELATIONSHIPS**

- \* Help find one or two advocates a year.
- \* Introduce a friend or associate to Citizen Advocacy.
- \* Arrange to meet a couple of advocates and proteges.
- \* Participate in a review of relationships and give advice to Co-ordinators.
- \* Sit in on an advocate orientation, support meeting, recruitment, or learning event.
- \* Become an Advocate Associate (give support to an advocate).
- \* Become an advocate.

### **LEADERSHIP**

- \* Arrange for a speaker (staff or board member) at your church, club, or other organisation.
- \* Become active on one or more committees.
- \* Offer your talents and special interests (writing, organising, public speaking, asking for contributions, ideas, etc.).
- \* Introduce new ideas at meetings or informally.
- \* Read and edit material for proposals, handouts, letters, PSA's etc.
- \* Review the strategic plan for your designated roles and responsibilities.
- \* Stop by the office or call the staff to meet and have informal discussions on what is happening.
- \* Host an information or discussion evening about Citizen Advocacy.

# ROLE OF SUB-COMMITTEES

## FUNDING SUB-COMMITTEE

**Aims:** To ensure the future financial stability and growth of Illawarra Citizen Advocacy Inc.

**Strategy:** a) Seeking alternative funding through grant applications and community sponsorships  
b) Financial membership development. Provide new members and have them members attend the AGM;  
\* Sending membership notices  
\* Identify people to ask  
\* Promotional material to attract funding  
\* Learning how to present Citizen Advocacy stories  
\* Examine and understand the current systems which are available or in place to support membership.

## POLICY AND PROCEDURE SUB-COMMITTEE

**Aims:** To annually review policies and procedures.

**Strategy:** Annual review of policies prior to Department of Health & Family Services Assessment. There are only a few policies in the programme, these need to be reviewed annually. The sub-committee needs only to meet a couple of times a year.

## KEY OFFICE ACTIVITIES SUB-COMMITTEE

**Aims:** To provide support, guidance and direction to staff.

**Strategy:** To review procedures like recruiting, matching, follow along and other aspects of the Key Office Activities. Especially with regard to discontinuations.

The Key Office Activities sub- committee will be involved in planning and reviewing procedures one at a time during the meetings. This may provide some kind of insight into the problems that the programme experiences e.g. discontinuations

- \* Recruitment
- \* Matching
- \* Orientation
- \* Follow Along
- \* Training
- \* Advocate Associates
- \* Encourage advocates to join other associations



## **THE ROLE OF THE CITIZEN ADVOCACY OFFICE IN RECRUITMENT, SUPPORT AND FOLLOW-UP**

- \* Find and recruit people with intellectual disability who need an advocate
- \* Find and recruit advocates
- \* Orientation to protege needs, key concepts and advocacy role
- \* Define initial advocate role
- \* Introduction of advocate to protege
- \* Keep in touch, offer support to advocates
- \* Give advice, guidance, and support to advocates
- \* Introduce advocates to people who can help (Advocate Associates)
- \* Offer on-going learning opportunities to advocates

## **WHAT THE ROLE OF THE CITIZEN ADVOCACY OFFICE IS *NOT***

- \* To “do advocacy” as paid advocates
- \* “Checking up”
- \* To manage relationships
- \* “Case management”
- \* To meddle or interfere
- \* To change the system
- \* To provide formal services
- \* Promoting adversarial relationships
- \* Just friendship
- \* Filing Lawsuits
- \* Information and Referral
- \* Welfare

# **CITIZEN ADVOCACY KEY OFFICE ACTIVITIES**

\* Protege Recruitment

\* Advocate Recruitment

\* Matching

\* Orientation/Training

\* Support

\* Follow-Along

\* Balance of Activities

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# **THE EVALUATION INSTRUMENT: CAPE**

by Wayne Iliac and Carolyn Wheeler

Since the conceptualisation of Citizen Advocacy by Wolf Wolfensberger in 1966, this relatively new helping form has emerged in the form of over 200 Citizen Advocacy offices in the United States, Canada, Australia and England. Historically, many Citizen Advocacy Programmes have evolved their own particular variation of Citizen Advocacy, whereby the original conceptualisation was often misinterpreted and inappropriately implemented. As a result, some form or technique was needed to measure a Citizen Advocacy Programme's adherence to essential citizen advocacy principles and practices.

Citizen Advocacy Programme Evaluation (CAPE) by John O'Brien and Wolf Wolfensberger, was designed to meet the need for an instrument which would provide a standard against which programmes calling themselves citizen advocacy could be measured. The instrument takes the form of operationalising all of the essential, and some of the more desirable, specific components of the citizen advocacy concept into observable and measurable variables. In effect, CAPE constitutes a partial blue print for implementing Citizen Advocacy.

CAPE was developed over a period of several years and several versions. The first edition was edited by John O'Brien and Wolf Wolfensberger. The first edition was printed in 1979 by the Canadian National Institute on Mental Retardation (NIMR) which is now called the G.Allan Roehrer Institute on Mental Retardation. The second and current edition is called the Syracuse Test Edition, and has been published by the Person to Person: Citizen Advocacy office in Syracuse, in conjunction with the Training Institute for Human Service Planning, Leadership and Change Agency, directed by Wolf Wolfensberger.

CAPE consists of 36 ratings, divided into three categories designated as follows:

1. Adherence to Citizen Advocacy Principles
2. Citizen Advocacy Office Effectiveness
3. Programme Continuity and Stability

The Adherence to Citizen Advocacy Principles cluster consists of twenty ratings that are sub-grouped under the following headings: Advocate Independence, Programme Independence, Clarity of Staff Function, Balanced Orientation to Protege Needs, and Positive Interpretations of Handicapped People.

The Citizen Advocacy Office Effectiveness cluster consists of ten ratings, which measure seven key activities and the balancing of these activities. This rating cluster also looks at the sufficiency of the citizen advocacy staff in relationship to the demands of their job(s). These ratings are as follows: Vision and Creativity of Protege Recruitment, Advocate Recruitment, Advocate Orientation, Advocate-protege Matching, Follow-up and Support to Relationships, Ongoing Training, Advocate Associate Emphasis, Balance of Key Citizen Advocacy Activities, Encouragement of Advocate Involvement with Voluntary Associations, and Sufficiency of Citizen Advocacy Staff.

The Programme Continuity and Stability cluster consists of six ratings, which are sub-grouped under the two headings of community leadership involvement and funding issues.

Each of the 36 ratings consists of an explanation of the nature of the rating, including why the rating is in CAPE. The rating describes what evidence must be collected to make a rating assignment, and spells out a range of either four or five levels of quality. The rating levels are statements that describe levels of performance that range from the lowest level (“major deficiencies in complying with the principle of the ratings”), through intermediate levels, to the highest level of “distinctly positive implementation of the principle presented by the rating”.

Though easily readable and relatively straightforward, CAPE is not designed or intended for use by individuals acting alone. CAPE is intended to be used for evaluations by a team of at least three “raters” who are reasonably sophisticated regarding citizen advocacy principles and who have had previous CAPE or other similar experiences on evaluation teams. There is usually one or two team members who are new to Citizen Advocacy and to CAPE, which provides an excellent means of training in Citizen Advocacy. However, it is important that at least three people on a team have a strong background in Citizen Advocacy.

The general format for CAPE evaluations is somewhat standardised. Before the evaluation begins, team members review representative documentation and study the CAPE manual. During the assessment, the team members interview individuals who represent every aspect of the Citizen Advocacy programme, including staff, board members, advocates, proteges, and other community members who are interested and supportive of the endeavour. The files and office documents are usually reviewed at the office. Once the relevant information has been collected, the team meets as a whole and conducts what is called “conciliation.” The conciliation process is guided by a team leader who leads the team’s analysis of each rating.

This requires an extensive sharing of the relevant information, then comparing the evidence to the criteria of the ratings, and then selecting the rating level that most accurately characterises the performance of the citizen advocacy programme. The analysis continues until the team reaches a consensus as to the level of performance for each rating.

Besides measuring the Citizen Advocacy Office on the 36 rating criteria of CAPE, a team also engages in an analysis of issues, especially those considered to be “overriding” or “major issues.” Such issues are those which exceed the parameters of the specific CAPE ratings, or conceivably even CAPE itself.

All CAPE evaluations adhere to two crucial guidelines. The first is called the “what, not why rule.” Evidence is always considered in terms of what the particular Citizen Advocacy Office is actually doing. The countless “why’s” regarding programme practice are deemed irrelevant when assigning rating levels, even though they must be acknowledged by the team and understood in the context of the overall programme. However, when a team is working towards consensus on individual ratings, they only consider the reality of prevailing practices.

The second major guideline is that the fundamental perspective upon which CAPE hinges is the welfare of individual proteges. While advocates and the community commonly derive all sorts of benefits from Citizen Advocacy, the most immediate goal of the match should be the

benefit to the protege. Evaluation teams are not evaluating relationships per se, but rather the efforts and structures of the programme to promote advocate identification and action on behalf of proteges.

Once a team has completed its analysis, it prepares its recommendations and feedback. Sometimes feedback is only given in an oral presentation, but usually there is a written report as well. CAPE evaluations are demanding both on the programme being assessed and on team members. A great deal of preparation needs to occur to insure that the evaluation will go smoothly, and that the team is able to gather sufficient information to use the CAPE instrument. Team members work hard and often under challenging circumstances, as they frequently have to shift gears mentally, work together in sub-teams with people they do not know well, and find their way around a community (sometimes back roads and country places!) with novel directions. However, CAPE team members need not be “professionals” but rather people with a strong commitment to Citizen Advocacy and a willingness to engage in the evaluation process and demands. The outcome is invariably a valuable learning experience for both the programme being evaluated and those who participate in the evaluation process.

# **CONTENTS OF CITIZEN ADVOCACY PROGRAMME EVALUATION (CAPE)**

## **ADHERENCE TO CITIZEN ADVOCACY PRINCIPLES**

### **Advocate Independence**

- \* Unpaid roles
- \* Loyalty to proteges
- \* Citizen Advocacy office promotion of advocate loyalty to proteges - Internal promotion
- \* Advocate practice

### **Programme Independence**

- \* Independent administration and location
- \* Citizen Advocacy programme separation from direct service
- \* Independent office location
- \* Independence of funding sources

### **Clarity of Staff Function**

- \* Focus of staff role definition
- \* Staff independence from other advocacy forms
- \* Ties to the citizen advocacy movement

### **Balanced Orientation to Protege Needs**

- \* Protege characteristics
- \* Protege age
- \* Protege capacity for relationship reciprocity =
- \* Protege need for spokespersonship to defend human and legal rights
- \* Need for long term relationships
- \* Diversity of Advocacy Roles
- \* Diversity of current roles
- \* Diversity of current roles
- \* Balance of current and planned advocacy relationships
- \* Availability of crisis advocates
- \* Involvement of youth advocates
- \* Avoiding social overprotection

## **CITIZEN ADVOCACY OFFICE EFFECTIVENESS**

- \* Vision and creativity of Protege recruitment
- \* Advocate recruitment
- \* Advocate orientation
- \* Advocate - Protege matching
- \* Follow-up and support to relationships
- \* Ongoing training
- \* Advocate associates emphasis
- \* Balance of Citizen Advocacy Key Office Activities
- \* Encouragement of advocate involvement in voluntary associations
- \* Sufficiency of Citizen Advocacy office staff

## **PROGRAMME CONTINUITY AND STABILITY**

- \* Community leadership involvement
- \* Feasible governance and guidance structures
- \* Composition of governance and guidance bodies
- \* Level of leadership involvement
- \* Fund-related issues
- \* Long term funding potential
- \* Local funding participation
- \* Programme legitimisation

From Citizen Advocacy Programme Evaluation (CAPE), O'Brien and Wolfensberger, 1979.