

DOCUMENT RESUME

ED 117 909

EC 081 332

TITLE Avenues to Change: Trainers Manual.
 INSTITUTION National Association for Retarded Citizens, Arlington, Tex.
 SPONS AGENCY Bureau of Education for the Handicapped (DHEW/OE), Washington, D.C.; National Inst. of Mental Health (DHEW), Rockville, Md.; Rehabilitation Services Administration (DHEW), Washington, D.C.
 PUB DATE 75
 GRANT OEG-0-72-5311
 NOTE 98p.; For related information, see EC 081 331 and EC 081 114-117

EDRS PRICE MF-\$0.83 HC-\$4.67 Plus Postage
 DESCRIPTORS *Child Advocacy; Exceptional Child Services; *Guidelines; *Institutes (Training Programs); Instructional Materials; *Mentally Handicapped; Organizations (Groups); *Program Development; Workshops
 IDENTIFIERS National Association for Retarded Citizens

ABSTRACT

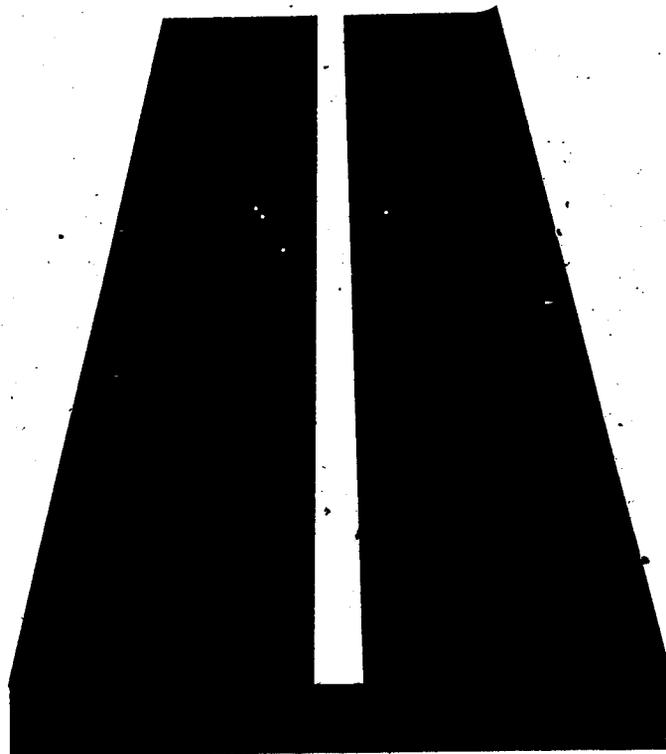
Guidelines are presented by the National Association for Retarded Citizens to help state and local associations develop citizen advocacy programs. The manual's first section contains an overview of preparing for and conducting workshop training sessions, including a discussion of needed materials and equipment. The bulk of the document is composed of specific instructions and scripts for eight workshop activities, including an orientation to citizen advocacy, and a discussion on applying citizen advocacy to the needs of the mentally retarded. Each activity is preceded by information regarding purpose and training sequences. Sample handouts and scripts for a lecture of audiovisual presentation are also provided. Covered in three appendixes are needed materials, physical arrangements, and a sample letter of invitation. (CL)

 * Documents acquired by ERIC include many informal unpublished *
 * materials not available from other sources. ERIC makes every effort *
 * to obtain the best copy available. Nevertheless, items of marginal *
 * reproducibility are often encountered and this affects the quality *
 * of the microfiche and hardcopy reproductions ERIC makes available *
 * via the ERIC Document Reproduction Service (EDRS). EDRS is not *
 * responsible for the quality of the original document. Reproductions *
 * supplied by EDRS are the best that can be made from the original. *

TRAINERS MANUAL

U.S. DEPARTMENT OF HEALTH
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY.



Avenues To Change

2

NATIONAL ASSOCIATION FOR RETARDED CITIZENS
2709 AVENUE E EAST
P. O. BOX 6109
ARLINGTON, TEXAS 76011

ED117909

EC 081 332

AVENUES TO CHANGE: A Citizen Advocacy
Training Workshop Manual

This trainer's manual was developed in conjunction with the NARC Project, A National Citizen Advocacy Model For Mentally Retarded Children, supported by Grant #OEG-0-72-5311 from the Bureau of Education for the Handicapped, National Institute of Mental Health, and Social Rehabilitation Services of the U. S. Department of Health, Education and Welfare.

National Association for Retarded Citizens
2709 Avenue E East, Arlington, Texas 76011

PREFACE

In answer to a growing enthusiasm and a stated need, The National Association for Retarded Citizens has developed highly specific written guidelines to help state and local ARCs establish Citizen Advocacy Programs. The Citizen Advocacy approach has much potential benefit for handicapped persons who need long or short term help in safeguarding their legal and human rights and who require assistance in securing appropriate services of a high quality. The conceptual and programmatic components of Citizen Advocacy are covered in NARC's printed and audio-visual training package which basically consists of four books on all aspects of Citizen Advocacy, a 14½-minute, color-sound movie on the concept, and a 15-minute slide presentation on advocate roles. These training materials are supplemented by the presentation of an eight-hour workshop.

The purpose of this manual is to provide detailed instructions for conducting this Citizen Advocacy Training Workshop, taking the presentors from the planning phases on into the actual presentation. The manual was developed in conjunction with NARC's Child Advocacy Project, A National Citizen Advocacy Model for Mentally Retarded Children, which was funded by the Bureau of Education for the Handicapped, National Institute of Mental Health, and Social Rehabilitation Services of the United States Department of Health, Education and Welfare.

The manual consists of two major sections. The first section provides information on the purposes of the Citizen Advocacy Training Workshop, major groups which can benefit from participation, and specific guidelines for workshop preparation, including gathering needed materials and equipment, and taking other preparatory steps.

The second section contains specific guidelines for conducting the workshop, including use of scripts for lectures and audio-visual presentations, and instructions for small group activities. A detailed workshop schedule is provided to assist the trainer(s) in maintaining necessary time limits for each activity or parts thereof. Every activity in the manual is preceded by information for the trainer(s), including the number designation of the activity, its purpose, and the specific steps which are involved. Immediately following the information for the trainer(s) is either a sample handout for the participants which contains instructions for a team exercise, or a script for a lecture or audio-visual presentation.

A supplementary section is also included to assist the trainer(s) in determining needed equipment and materials and planning the physical arrangement of the room for the workshop. An example of the type of invitational correspondence which should be sent to prospective participants in the workshop is also included.

TABLE OF CONTENTS

| | Page |
|--|------|
| Preface..... | ii |
| Table of Contents..... | iv |
| <u>Section I: Preparing For And Conducting A Workshop</u> | |
| -The NARC Citizen Advocacy Training Workshop: An Overview of Workshop Activities..... | 2 |
| Activity I: Introduction to Workshop..... | 3 |
| Activity II: Orientation to Citizen Advocacy..... | 3 |
| Activity III: Applying Citizen Advocacy to the Needs of Mentally Retarded Persons..... | 3 |
| Activity IV: Review of Morning Session and Overview of Afternoon Activities..... | 4 |
| Activity V: Planning and Operating a Program..... | 4 |
| Activity VI: Critiquing a Program Description..... | 4 |
| Activity VII: An Action Plan for Establishing a Citizen Advocacy Program..... | 4 |
| Activity VIII: Workshop Summary..... | 5 |
| Workshop Training Materials..... | 5 |
| Participants for the Workshops..... | 6 |
| <u>Workshop Guidelines</u> | 7 |
| Preparation for the Workshop..... | 7 |
| Materials Needed for the Workshop..... | 7 |
| Determining the Size of the Workshop..... | 9 |
| Locating the Workshop Setting..... | 9 |
| Requesting Attendance..... | 10 |

| | |
|---|----|
| Ensuring Availability of Equipment and Materials..... | 10 |
| Persons Needed to Conduct the Workshop..... | 10 |
| Rehearsing for the Workshop..... | 11 |
| Conducting A Workshop..... | 11 |
| Grouping Participants..... | 11 |
| Reading Instruction Forms..... | 12 |
| Providing Opportunities for Questions..... | 12 |
| Maintaining a Time Schedule..... | 12 |
| Time Frame for Workshop..... | 12 |
| <u>Section II: Specific Instructions and Scripts for Workshop Activities</u> | |
| Detailed Workshop Timetable..... | 14 |
| Training Workshop Agenda..... | 16 |
| Activity I: Introduction to Workshop..... | 17 |
| Activity II: Orientation to Citizen Advocacy..... | 23 |
| "Building Blocks to Citizen Advocacy"..... | 26 |
| "Citizen Advocacy: An Answer for Thursday's Child"..... | 35 |
| Activity III: Applying Citizen Advocacy To The Needs of Mentally Retarded Persons C-A 1..... | 46 |
| Activity IV: Review of Morning Sessions and Overview of Afternoon Activities..... | 49 |
| Activity V: Planning and Operating A Program..... | 52 |
| Activity VI: Critiquing A Program Description..... | 68 |
| Ca-2, Ca-2a, CA-2b | |
| Activity VII: An Action Plan for Establishing a State or Local Advocacy Program CA-3..... | 78 |
| Activity VIII: Workshop Summary and Evaluation CA-4.... | 81 |
| Closing Remarks..... | 84 |

SECTION III: APPENDICES

| | |
|--|----|
| Appendix A: Materials Checklist..... | 87 |
| Appendix B: Physical Arrangements..... | 89 |
| Appendix C: Letter of Invitation..... | 90 |

SECTION I

PREPARING FOR AND CONDUCTING A WORKSHOP

THE NARC CITIZEN ADVOCACY TRAINING WORKSHOP

The Citizen Advocacy Training Workshop is intended to help state and local ARC's become knowledgeable about all aspects of the Citizen Advocacy approach, and to provide training relative to the implementation and operation of Citizen Advocacy Programs. This workshop was initiated at the national level by involving key ARC state level volunteers and staff in training sessions which were conducted by the NARC Regional Representative and Child Advocacy Project staff at the six NARC Regional Conferences occurring during 1974. The participants of these initial sessions were trained to conduct the workshop within their respective states and at the local level.

Overview of Workshop Activities

The workshop curricula consists of brief lectures, audio-visual presentations, and problem-centered tasks for small group activities. A major feature of the workshop is the opportunity for experience-based learning since many of the activities require participants to learn by interacting and working in teams. The lectures and audio-visual presentations serve as a basis for team work. The sequence and interrelation of the workshop activities enable the participants to progressively cope with more complex concepts in the Citizen Advocacy model, as indicated in the following activity descriptions:

Activity I: Introduction to Workshop. This initial activity requires the trainer to read a prepared introductory statement. This brief introduction discusses the intent and purposes of the workshop and provides an overview of all workshop activities.

Activity II: Orientation to Citizen Advocacy. The participants are presented with an overview of the Citizen Advocacy approach via a 14½-minute movie, a brief lecture, and a 35mm slide presentation. The movie deals with the general concept of Citizen Advocacy while the lecture emphasizes some of the core concepts presented in the film. The slide presentation focuses on advocate roles, thereby helping the participants associate activities inherent in the approach with the theory of Citizen Advocacy. The slides are furnished in a carousel.

Activity III: Applying Citizen Advocacy to the Needs of Mentally Retarded Persons. This is a group activity in which the participants are asked to consider the service needs of mentally retarded persons living in their community and then indicate how Citizen Advocacy could be applied to help ensure that indicated service needs are adequately met. This exercise further encourages the participants to think about practical application of the concept as well as helping them to associate Citizen Advocacy with the rights, interests, and service needs of mentally retarded persons.

Activity IV: Review of Morning Session and Overview of Afternoon Activities. The trainer uses a prepared script to briefly re-emphasize important points made during the preceding activities and to clarify the general nature of the afternoon session. The relation to the core training materials, Avenues To Change, Books I-IV, to both morning and afternoon activities is also shown.

Activity V: Planning and Operating a Program. The trainer makes a presentation from a prepared script in order to help the participants understand the basic procedures for planning for and implementing a Citizen Advocacy Program. This presentation is supplemented by 35mm slides which emphasize certain portions. The slides are furnished in a carousel.

Activity VI: Critiquing a Program Description. The participants are organized in small groups and asked to study and assess a sample program proposal. The proposal (narrative and budget) contains a number of problems relating to the success and effectiveness of the hypothetical program, and by spotting these flaws, the participants are helped to become aware of common pitfalls in planning a program.

Activity VII: An Action Plan for Establishing a Citizen Advocacy Program. This group activity provides an opportunity to utilize the knowledge and skills developed during the workshop. The participants are asked to lay out specific plans relative to implementation of a Citizen Advocacy Program in their

area, including persons who will be responsible for each phase of implementation and dates for completing each step.

Activity VIII: Workshop Summary. The trainer closes the workshop by stressing the importance of following the major tenets of the model, and the principles of program implementation and operation as presented in the workshop. Questions relating to the workshop activities are invited and answered.

Workshop Training Materials

The core training materials for the workshop are four books, Avenues To Change, which provide detailed information on all aspects of the Citizen Advocacy approach. The printed materials are additionally intended to independently provide detailed guidelines on program implementation and operation. The first book, Citizen Advocacy for Mentally Retarded Children: An Introduction, provides a brief orientation to the concept of Citizen Advocacy for a general readership. The second book, Implementation of Citizen Advocacy Through State and Local ARCs, offers specific information on the operation and evaluation of state and local Citizen Advocacy Programs. The third book, Effective Advocacy, is written for the advocate and gives general facts on mental retardation, advocate roles and responsibilities, and advocate-protege relationships. The fourth book, YOUTH As A Citizen Advocate, furnishes basic information on the concept and program for young persons between the ages of 13-18 who are interested in Citizen Advocacy.

Other training materials used in the Citizen Advocacy

Training Workshop are a 14½-minute film, Something Shared, and a 15-minute slide presentation. The movie explores the advocate-protege relationship and stresses the importance of the local Citizen Advocacy office. The slide presentation emphasizes the flexibility and scope of Citizen Advocacy by discussing long and short term roles, formal and informal assistance; and emotional and practical aid given in advocate-protege relationships. These audio-visual materials may also be used independently of the workshop for discussing certain concepts related to the Citizen Advocacy approach.

Participants for the Workshop

The Citizen Advocacy Training Workshop is designed especially for assisting state and local ARCs in their efforts to establish and operate Citizen Advocacy Programs. The workshop is, however, appropriate for any group or organization which is interested in Citizen Advocacy for other developmentally disabled persons since the Citizen Advocacy approach is applicable to the needs of all developmentally disabled individuals.

WORKSHOP GUIDELINES

These workshop guidelines are offered to assist in preparing for and conducting a Citizen Advocacy Training Workshop. Persons involved in the pre-workshop or workshop phases should carefully study these instructions in order to ensure a successful and effective training program.

Preparation for the Workshop

In most cases, preparation for the Citizen Advocacy Training Workshop will require four to five weeks. Since there are several separate tasks to be completed before conducting the workshop, it is advisable that a co-ordinated planning group or committee be involved in the preparatory phases.

Materials Needed for the Workshop. The printed and audio-visual training materials, i.e., books I-IV, the movie, and the slide presentations, are supplied in the Citizen Advocacy training package. Also included in this training package are the number of needed instruction forms for group activities (see C-A 1, 2, 2a, 2b, 3 and 4 in this manual) and additional scripts for the slide presentations in order that the trainer and the person assisting with the audio-visual equipment will have separate copies (if a synchronized tape is not used). This training package is available upon request from the six NARC Regional Offices. Sufficient printed materials are supplied free of charge, and audio-visuals are loaned as needed; thus availability should be determined before planning for a workshop and requests

for materials should be made well in advance.

Other equipment and materials which are needed to conduct the workshop must be provided by the sponsor. The following list includes a description and rationale for needed items:

A. For note taking and recording information, participants will need:

- 1) approximately five (5) sheets of 8½" x 11" paper and two (2) pencils for taking notes and recording plans for state or local action;
- 2) approximately six (6) large sheets of paper (28" x 34") for each group, or blackboard (approximately 4' x 6'), since some group activities require recording information which will be reported to other participants;
- 3) one roll of tape (masking tape is preferable) if the large sheets of paper are used; and
- 4) one felt tip pen for each group if the large sheets of paper are used.
- 5) six (6) carbon packs (or 1 for each state or local unit represented) to record state or local action plans.

B. The movie and the slide presentation will require:

- 6) one (1) 35mm carousel slide projector with automatic focusing (carousels not needed);
- 7) one (1) 16mm sound movie projector;
- 8) one (1) 16mm take-off reel;
- 9) one (1) 6 X 6 movie screen (or two screens if desired, one for each audio-visual unit);

10) one (1) small flashlight to enable the projectionist to read scripts during the slide presentations if a synchronized tape is not used; and

11) one (1) map pointer for use with slides in "Planning and Operating a Program" presentation.

C. The following items of furniture are needed for the trainers and participants:

12) two (2) small tables for movie and slide projectors;

13) one (1) table and chairs for trainers;

14) one table lectern with light and microphone;

15) tables (preferably round) which will accommodate 6 to 8 participants each;

16) chairs for participants; and

17) miscellaneous materials: scotch tape, paper clips, rubber bands, pens, glasses, water, ash trays.

In order to ensure that all necessary materials and equipment are secured for the workshop, a checklist is included in Appendix A.

Determining the size of the workshop. The workshop is designed to be maximally effective for 25 to 40 participants. This size range ensures the formation of an adequate number of groups with 6 to 8 participants in each group. Also, an informal size should be maintained in order to stimulate questions and discussion.

Locating the workshop setting. The architectural features of the workshop room will be important (see Appendix B). It must be possible to darken the room for the movie and slide

presentations. There must also be enough space to situate the projectors and screens for easy viewing by the participants.

Requesting attendance. A letter of invitation should be sent to prospective participants at least one month prior to the workshop. This letter (see Appendix C) should inform the invitee of the purpose of the workshop, the general agenda, and the date, time and place. A postcard should be enclosed with the invitation for the invitee to indicate intentions of attending.

Ensuring availability of equipment and materials. The materials and equipment checklist in Appendix A must be thoroughly reviewed prior to the workshop, allowing enough time to secure missing items. When possible, the room for the workshop should be prepared a day in advance and audio-visual equipment should be tested.

Persons needed to conduct the workshop. At least one trainer and two assistants are required for conducting the workshop. Three people to conduct the workshop will help prevent over-exposure to one speaker, which can reduce participant interest. One of the assistants will be needed throughout the workshop for operating the projectors, distributing instruction forms for group activities, and providing clarification of instructions when needed during activities.

Rehearsing for the workshop. All activities involving scripts, or scripts in conjunction with slide presentations, must be adequately rehearsed to ensure effectiveness during presentation. Certain words in the scripts may be altered to fit the speaking style of the trainer, but the basic content of the script should not be changed. The audio-visual presentations must be rehearsed until there is consistent synchronization between the speaker and the projected slides. Timing required to set up for various equipment changes between audio-visual presentations should be rehearsed so the workshop will flow smoothly.

CONDUCTING A WORKSHOP

The following guidelines are offered in order to help the trainer conduct an interesting and effective workshop.

Grouping participants. The trainer should know the workshop participants in terms of their general and professional interests. At the beginning of the workshop, small teams of 6 - 8 members should be formed and name tags could be placed on the tables to indicate group placement. The composition of each team should reflect a wide range of interests, knowledge, expertise, etc. Diversification within teams will help increase learning experiences for all participants and promote active participation. The groupings established at the outset should be maintained throughout the workshop unless otherwise indicated by instructions for an activity. Some activities require that members of the same state or local unit be grouped together,

while others require dispersed groups of varied participants.

Reading instruction forms. The team activity is an important feature of the workshop. It is then imperative that team members read and understand instructions for an activity. To ensure a reading of instructions, the trainer must read each instruction form for an activity aloud, asking the participants to read silently. After reading the instructions, the trainer should determine if the participants have any questions regarding their tasks. The trainer and assistants should periodically check on the progress of the groups during an activity to further ensure understanding of instructions.

Providing opportunities for questions. Since the lectures and audio-visual presentations serve as a basis for team activities, it is also imperative that the participants fully understand these activities.

Maintaining a time schedule. The length of time allotted for each activity in the Detailed Workshop Schedule, pp. 14 and 15, indicates minimum requirements. The times designated for each activity and overall length of the workshop are important for maintaining participant interest and, therefore, should not be altered.

Time frame for workshop. The workshop should be presented in a one-day period because the activities comprising the workshop are highly interrelated. Thus, time separations between the activities, i.e., presenting the workshop in a series of meetings, would reduce its effectiveness.

SECTION II

SPECIFIC INSTRUCTIONS AND SCRIPTS

FOR WORKSHOP ACTIVITIES

Detailed Workshop Timetable

This schedule is to assist the trainer in maintaining the basic workshop schedule.

| Time | Activity | Materials |
|-----------------|--|-----------|
| BLOCK I | | |
| 20 min. | <u>PRESENTATION:</u> "Introduction to Workshop" | |
| 65 min. maximum | Audio-visual Presentations and Lecture: "Orientation to Citizen Advocacy" | |
| 20 min. | 1) Film: "Something Shared" | |
| 25 min. | 2) Presentation: "Building Blocks To Citizen Advocacy" | |
| 20 min. | 3) Slide Presentation: "Citizen Advocacy: An Answer for Thursday's Child" | |
| 15 min. | COFFEE BREAK | |
| 65 min. maximum | <u>TEAM ACTIVITY:</u> "Applying Citizen Advocacy to the Needs of Mentally Retarded Persons" | |
| 5 min. | 1) Instructions | CA-1 |
| 30 min. | 2) Task | |
| 30 min. | 3) Group Reports | |
| 15 min. | <u>PRESENTATION:</u> Review of Morning Session and Overview of Afternoon Activities | |
| 1 hour | LUNCH | |
| BLOCK II | | |
| 40 min. | <u>PRESENTATION:</u> "Planning and Operating A Program" | |
| 90 min. maximum | <u>TEAM ACTIVITY:</u> "Critiquing A Program Description" | |
| 5 min. | 1) Instructions | |
| 45 min. | 2) Task | CA+2 |
| 35 min. | 3) Group Reports | CA-2a |
| 5 min. | 4) Trainer Feedback | CA-2b |
| 15 min. | COFFEE BREAK | |

| | Activity | Materials |
|---|--|-----------|
| 65 min. maximum | <u>TEAM ACTIVITY:</u> "An Action Plan for Establishing A State or Local Citizen Advoca- cacy Program" | |
| 5 min. | 1) Instructions | CA-3 |
| 30 min. | 2) Task | |
| 30 min. | 3) Group Reports | |
| 30 min. | <u>SUMMARY:</u> Participant Evaluation of Work- shop, Questions and Answers, and Closing Remarks | CA-4 |
| <u>TOTAL TIME</u> 8 hours (Including Lunch) | | |

CITIZEN ADVOCACY TRAINING WORKSHOP

AGENDA

MORNING SESSION

| | |
|-------------------|--|
| 9:00 - 9:20 a.m. | <u>Introduction to Workshop</u> |
| 9:20 - 10:25 | <u>Presentation:</u> Orientation to Citizen Advocacy |
| 10:25 - 10:40 | COFFEE BREAK |
| 10:40 - 11:45 | <u>Team Activity:</u> Applying Citizen Advocacy to the Needs of Mentally Retarded Persons |
| 11:45 - 12:00 | <u>Presentation:</u> Review of Morning Session and Overview of Afternoon Activities |
| 12:00 - 1:00 p.m. | LUNCH |

AFTERNOON SESSION

| | |
|-------------|---|
| 1:00 - 1:40 | <u>Presentation:</u> Planning and Operating A Program |
| 1:40 - 3:10 | <u>Team Activity:</u> Critiquing A Program Description |
| 3:10 - 3:25 | COFFEE BREAK |
| 3:25 - 4:30 | <u>Team Activity:</u> An Action Plan for Establishing a State or Local Citizen Advocacy Program |
| 4:30 - 5:00 | <u>Summary:</u> Participant Evaluation of Work- shop, Questions and Answers, and Closing Remarks |

Activity I: INTRODUCTION TO WORKSHOP

Purpose: To acquaint the participants with the purpose of the workshop and to discuss expectations for participants during and after this workshop.

Steps for Trainer:

- step one - Call the meeting to order.
- step two - Group participants so that representatives of the state and local levels of NARC and other participants will be dispersed among the groups.
- step three - Read aloud the script entitled "Introduction to Workshop". It may be desirable to change certain words to fit the style of speaking to that of the trainer making the presentation. The general content, however, should not be changed.
- step four - Answer questions relative to the presentation if desired.

INTRODUCTION TO WORKSHOP

This is a period of time when many changes are occurring in the field of mental retardation. Landmark decisions have been made in the Courts regarding education and the quality of residential services. It is a time when people are seeking alternatives to the traditional large, multipurpose institution, and comprehensive community-based residences and services are appearing. Perhaps most importantly, it is a time when individual citizens are becoming concerned enough to become directly involved in the struggle to obtain legal and human rights and needed services for mentally retarded persons and to uphold their human dignity.

The Citizen Advocacy concept was developed by Dr. Wolf Wolfensberger during the late 1960's. It was first applied as a program in 1971 in Lincoln, Nebraska, where Mrs. Leola Novak started the Lincoln Citizen Advocacy program with assistance from Dr. Wolfensberger. The Lincoln program has probably been the single most influential force in the development of Citizen Advocacy in the United States.

After three years, more than 60 Citizen Advocacy Programs are now in operation in more than 20 of the United States and in Canada. Some states have implemented Citizen Advocacy on a state-wide basis with several local offices coordinated by

a State Advocacy Office. Almost without exception, these programs have been implemented under the sponsorship of an ARC. The ARC is logically the mechanism by which Citizen Advocacy should and can be established across this nation, thus forming a Citizen Advocacy network.

The primary basis for the establishment of ARCs and the reason for their continuing existence is the desire to ensure that the service needs of mentally retarded persons are being adequately met, and to speak out for their rights and interests. The aim of the ARC is, therefore, very compatible with the intent of Citizen Advocacy. By using the Citizen Advocacy approach, ARCs can broaden their base of support and facilitate the attainment of their basic objectives.

NARC initiated the Child Advocacy Project in 1972 in order to bring together existing information and expertise for developing model programs which can be used by all ARCs as well as by groups of other developmentally disabled persons. The National Headquarters for NARC recognized that Citizen Advocacy could be a major tool for enabling the ARCs to accomplish their mission to help mentally retarded persons. It was, however, recognized that there were no consistent or complete written guidelines for ARCs to use in implementing and operating new programs. In an effort to remedy this problem and ensure that Citizen Advocacy programs were maximally successful and effective, NARC developed a comprehensive package of audio-

visual and written training materials which deal with the conceptual and programmatic aspects of Citizen Advocacy. These materials were subjected to intensive consumer review and were then polished and finalized for presentation in today's workshop.

You have been invited to participate in this Citizen Advocacy Training Workshop because you are the key to starting and running a successful advocacy program. Some of you are already familiar with the concept of Citizen Advocacy and may have been directly involved in such a program. Others will find all of this information entirely new. Through your attendance today, you will be afforded an opportunity to experience firsthand the Citizen Advocacy Training Program. This workshop uses a comprehensive package which should be useful not only for implementing new offices, but also for recruiting and training Citizen Advocates. It can also be used to strengthen existing programs. You are, in effect, being familiarized with a readily transportable training and educational program.

It is essential that the entire workshop be attended by each participant. The activities are highly interrelated, and emphasis is placed on experience-based learning in small group activities. The effectiveness and meaningfulness of the workshop will be significantly reduced if any portion of it is missed.

Each of you has an agenda for today's workshop. If you will now refer to this schedule, we will briefly outline the

sequence to be followed.

We will begin by presenting an overview of Citizen Advocacy. The concept will be introduced by a film which illustrates the basic aspects of Citizen Advocacy. The motion picture will be followed by both a detailed discussion of the important points made in the film, and a slide presentation concerned with basic advocate roles.

The practical aspects of Citizen Advocacy will then be considered by reviewing the needs of mentally retarded persons and outlining specific ways in which Citizen Advocacy could be applied in order to meet these needs.

After lunch you will hear a brief presentation on plans and procedures for planning and operating Citizen Advocacy Programs.

Following this presentation you will be asked to evaluate a proposal for establishing a Citizen Advocacy Program by assessing the soundness of the conceptual and programmatic aspects of the plan.

The next activity will involve the development of an action plan for implementing Citizen Advocacy at state or local levels.

During the course of today's workshop, you will be given illustrative materials which supplement some activities. A set of the four-book series on Citizen Advocacy developed by the Project staff, entitled Avenues To Change, will also be distributed. A trainer's manual for conducting state and local

Citizen Advocacy Training Workshops will be available through the NARC Regional Office, and the printed and audio-visual training materials which are used today are also offered on a loan basis through that office.

Activity II: ORIENTATION TO CITIZEN ADVOCACY

Purpose: To help the participants develop an understanding of the basic tenets of the Citizen Advocacy concept.

Steps for Trainer:

step one - prepare participants for the activity by reading aloud the script "Orientation to Citizen Advocacy".

step two - show movie, "Something Shared".

step three - after viewing the film, read aloud the script "Building Blocks to Citizen Advocacy".

step four - show slide presentation, "Thursday's Child Has Far To Go".

NOTE: If the slide presentation is not accompanied by the synchronized taped narration with music and the trainer is required to read aloud from the script, "An Answer for Thursday's Child", the carousel must be adjusted on the slide projector in order that the presentation begins with slide #7 which is cued to the line "Monday's child is fair of face".

step five - answer questions relative to this activity.

ORIENTATION TO CITIZEN ADVOCACY

As we all know, participants' levels of knowledge concerning Citizen Advocacy are quite varied, so, my job now is to establish some common ground for the rest of the day's activities. This will be done by presenting some key "Building Blocks To Citizen Advocacy" through the use of a film and a presentation followed by a slide show.

The Project's 14½-minute color-sound film on Citizen Advocacy, "Something Shared", will be shown first followed by a lecture on the concept which is keyed to various segments of the film. A slide presentation, "Citizen Advocacy--An Answer For Thursday's Child", which concerns advocate roles in meeting the needs of mentally retarded persons will then be shown to supplement and reinforce knowledge gained thus far.

A few of you may have already seen the film, "Something Shared". Those of you who have not yet viewed it are in for a pleasant and informative quarter hour. The film was produced by Jamieson Film Company of Dallas who also produced the award-winning "Where Do The Children Play?" for NARC. The Citizen Advocacy film was scripted with the input of key NARC volunteers, the Project's National Advisory Committee, and NARC staff members. Footage was shot in Denver, Colorado, and there are no actors shown. What you will see in action are real advocates and proteges from the Colorado and Omaha, Nebraska Citizen Advocacy programs.

You will be hearing original music specifically scored for this film by Dallas-based artist Jerry Coward. Keep in mind as you watch the film that its intention is to depict the best in Citizen Advocacy relationship possibilities for a film which is to be used in advocate recruitment and training. The movie promotes the idea of mentally retarded people as valued individuals who can benefit from and contribute to the Citizen Advocacy movement. So now we're ready to "Roll 'em..."

"BUILDING BLOCKS TO CITIZEN ADVOCACY"

If one picture is worth a thousand words, just think how many words 8,000 feet of 16mm film must equal! That's how many feet it took to edit "Something Shared" down to the 522 feet of film you just viewed. Naturally, this means that some things must necessarily have been left out. The purpose of this Presentation is to explore in more detail all of the subtle things you saw in this film, but perhaps wouldn't fully recognize until you had screened the film many times. And, we also want to emphasize some of the practical aspects of Citizen Advocacy that were touched on in the motion picture.

I think the first over-riding impression one must get from viewing this film is that Citizen Advocacy is REAL--it involves real people doing real things for others. The majority of the advocates and proteges in the film are actually involved in relationships at this time. Often the day-to-day realities of the lives of the mentally retarded aren't as pretty or as easy or as fair as they should be; this film shows just how capable citizen volunteers can set about improving the quality of life for mentally retarded persons.

For example, when you first see the movie, it may appear to you that Charley and Stu are just "truckin' around" as Stu would say, having a good time, enjoying a little Saturday afternoon recreation. However, in reality, Stu is filling a more practical role for Charley than just giving him a way to spend his leisure hours on the week-end. Stu is introducing Charley, who hasn't been living away from an institution for very long, to the community, and he is also introducing that community to Charley. He is giving Charley the chance to associate with other persons away from the group home for mentally retarded young people where Charley lives. He is making Charley a part of the REALITY of everyday human existence in the community.

Throughout the film, we see advocates learning from proteges. Charley teaches Stu things, rather than having Stu cast as the all-knowing advocate who is out to "do good". Stu doesn't know why avocado seeds must have toothpicks stuck in them to keep them from drowning when Charley is trying to start an avocado sprout, so Charley explains it to him. It's a two-way relationship. In their pool-shooting scene, we see the friendly give-and-take that occurs between people who can relate to each other as equals, and it's a relationship where both parties can handle disappointments. At the end of the

film, we see Stu tell Charley that he will have to take a raincheck on coming up to Charley's room to see the avocado sprout--, and we observe Charley take this disappointment in stride. Both men have busy weeks ahead of them, and both know they will see each other again soon. (pause)

Just what is "Citizen Advocacy" then?

With Charley and Stu's relationship in mind, let's define Citizen Advocacy precisely. As mentioned in the film, it's basically "a one-to-one relationship between a capable volunteer advocate and a mentally retarded protege in which the advocate vigorously defends the rights and interests of the protege, and provides practical or emotional reinforcement (or a combination of both) for him. All of this occurs within the framework of a structured advocacy system". Practical reinforcement refers to helping fill the tangible needs of the protege, like helping him become employed, learn about public transportation, open a bank account, vote, manage money, or do any number of other things that may range from learning to tell time to getting a driver's license, from knowing how to feed himself to knowing how to prepare meals. Emotional reinforcement refers to filling the needs all of us have for warmth, friendship and the sense that somebody cares. While some advocacy

roles are strictly emotional, and others are strictly practical, the majority fall somewhere in between, like Charley and Stu's. And there are other types of advocacy roles as well, which you will see illustrated in the slide presentation in just a few minutes, that involve more formal, legal arrangements. Examples are guardianships, trusteeships, and conservatorships. Some of these advocacy roles provide ways for parents to see to it that their mentally retarded offspring are provided for after the parents' death. Other activities involve acting as spokesmen for the protege's interests right now if he or she is being denied needed services and benefits. Still other advocacy roles relate to crisis advocacy when an advocate steps in perhaps only one time to assist a protege in an emergency situation.

Just who needs Citizen Advocacy? As illustrated by the film, Citizen Advocates are needed by mentally retarded persons in institutions like Jo-Jo, by people living in the community like Kenny, and by those trying to adjust to community life like Charley. Retarded residents in both urban and rural areas, as well as members of all ethnic and socio-economic groups may need advocates.

Citizen Advocates meet the kinds of needs shown in the film as well as many needs that were not illustrated.

For instance, Citizen Advocates go to court. Just recently in one local program, two little girls were about to be taken away from their mentally retarded mother, but the local advocacy coordinator stepped in, and with the agreement of the court, advocates were found for the mother and the children. Now, those two little girls are still at home. In other programs all around the country, Citizen Advocates are involved in ensuring equal educational rights and social services for mentally retarded children. There are as many roles for Citizen Advocates to fill as there are variations of the human condition.

Where did Citizen Advocacy come from? As people in ARCs know, the idea of advocacy is not new. Advocacy has historically been a basic mission of the ARC. Advocates have also been around for a long time in the form of lawyers, ombudsmen, group advocates like ARCs, protective service agencies, and, of course, parents as advocates for their own children. Citizen Advocacy, on the other hand, is relatively new, and was originated by Dr. Wolf Wolfensberger. The idea behind this concept is that more individuals will be able to become involved on a one-to-one basis with handicapped people through a structured program that is aimed at obtaining and monitoring needed services for these persons and safeguarding their rights. The Citizen Advocate does not

take the place of the parent or the professional; he augments their efforts and adds an extra facet of independent representation in the life of the retarded person. In fact, when needed, the advocate can provide valuable assistance to the parents in locating services and helping them better meet the needs of their child. The advocate works with the parents, not around or behind them.

Today, there are thousands of advocates in over 60 Citizen Advocacy programs in 20 of the United States and in Canada. The time for advocacy is NOW! It fits in beautifully with the current thrust toward more active citizen involvement in fighting for the rights of retarded persons through such means as class action suits and litigation. It fits in with promotion of The Developmental Model which holds that all mentally retarded persons are capable of growth, learning and development. Advocates can play a vital part in reaching the Model's three goals: 1) to increase the mentally retarded person's control over his environment, 2) to increase the complexity of his behavior, and 3) to maximize the human qualities of the retarded person. Citizen Advocacy also fits in well with the Normalization Principle which basically says that, although a mentally retarded person will never be (quote) "normal" (unquote) he should live

in as normal an environment as possible, and follow as normal a rhythm of life as he can.

As you may have gathered from all this and from watching the film, a great deal is obviously asked of the Citizen Advocate. He is not just another volunteer spending a couple of hours a week in some group-oriented recreational activity with mentally retarded people. The Citizen Advocate is committing himself to a personalized involvement with a protege, and because of this, there are certain criteria a prospective advocate must meet in order to be accepted into the program. He should be an individual who is able to get along well with a variety of people; he should be someone his protege can look up to. He should be an aggressive fighter when it comes to the rights and interests of retarded people. He should not be planning to move to another city in the near future because this would endanger the continuity of the relationship. His life style should be generally socially acceptable, and he should be willing to go through a screening and training process conducted by the local advocacy office before he can be matched to a protege. All of these things should be reassuring to those of you who are parents of retarded children. The Citizen Advocate is not a saint or a do-gooder, however. He is an average, concerned citizen like you or I who

wants to do more than just talk about helping retarded people or contribute money to programming for them.

Now that you have heard what is expected of the advocate, you may ask what the advocate can expect.

He will certainly gain insights into the problems and lifestyles of mentally retarded people. He can also expect to achieve some personal satisfaction in being a part of the human ecology movement by making a personal contribution to a retarded person and performing a service for the protege that no agency or program could ever provide. Besides all of these things, the advocate will gain a new awareness of the strengths and weaknesses of services in the community in which he resides.

Another important thing the advocate can expect is reinforcement from the local Citizen Advocacy office and its Advisory Committee. In cases of legal, financial or emotional liability, the local office can offer valuable back-up to the advocate and help him find needed assistance by referring him to the right contact person or program who can best help him and his protege. Basically, an advocate is liable legally while with the protege to the same extent that a Boy Scout leader or a Little League baseball coach is liable for his charges while they are under his supervision. The Citizen Advocate should carry a valid driver's license and have adequate insurance coverage. Many state and local advocacy offices today are also looking into comprehensive insurance programs which cover both the staff and the advocates involved in relationships.

Before we move on to the slide presentation which delves more deeply into advocate roles, let's briefly summarize the basic building blocks to Citizen Advocacy which we should have recognized thus far from the film and this presentation. First, Citizen Advocacy is an action-oriented program involving mutually beneficial one-to-one relationships between citizen volunteers and mentally retarded persons. The advocate and protege are first brought together through a formal, structured program, and their ongoing relationships are monitored by the local office for both their benefits. Second, advocates do more than just entertain proteges. They are fighters for the rights of mentally retarded persons, and they bridge the gap that often exists between services needed by the protege and services received by him. Third, advocates may meet practical or emotional needs or a combination of both for mentally retarded persons in institutions, in the community, or for those making the adjustment from institutionalization to community life. And finally, by becoming a Citizen Advocate, a person also becomes part of a nation-wide movement to improve the quality of life for mentally retarded people.

Now, let's reinforce some of these ideas by taking a look at our slide presentation, "Citizen Advocacy - An Answer For Thursday's Child".

CITIZEN ADVOCACY -
AN ANSWER FOR THURSDAY'S CHILD

1
Dark

2 - 6 (run during opening music)

7
"Monday's Child is fair of face;

8
Tuesday's Child is full of grace;

9
Wednesday's Child is full of woe;

10
But Thursday's Child has far to go..."

11
Citizen Advocates can help mentally retarded

persons travel this distance. Today, these

12
"Thursday's Children" are beginning to benefit from

a growing public awareness of the needs of mentally

retarded persons; and the emphasis on citizen in-

13
volvement in meeting those needs. Recent years have

brought great advances in the understanding of

14
mental retardation, but there is still a vast

distance to cover.

(pause)

43

2 - blond boy
3 - boy under
turtle statue
4 - girl at table
5 - boy with pail
6 - smiling boy
7 - child and baby
8 - girls skipping
rope
9 - boy crying

10 - girl in red
coat

11 - boy running

12 - girl in tunnel

13 - boy and girl
studying

14 - kids on jungle
gym

15

Just what is Citizen Advocacy? Basically, it's

15 - title slide,
"Citizen Advocacy"

16

a one-to-one matching of a citizen volunteer or

16 - boys on steps

"advocate" with a mentally retarded person called a

17

"protege", in which the advocate spends time as a

17 - teenager
with child,

18

friend to the protege, acts as his spokesman to

18 - man speaking

19

ensure his rights, and helps bridge the gap between

19 - hands/tele-
phone

services available and services actually received by

the retarded person.

20

An advocate may meet the "emotional needs" of

20 - woman and
girl talking

21

his protege which are the intangible desires all of

21 - child hugging
baby

us have for affection, warmth and understanding.

22

And the advocate can meet the more "tangible, prac-

22 - "For Rent"
sign

tical needs" of the protege as he helps him with

23

problem-solving and learning the basics of daily

23 - check book

24

living. Or an advocate can fill a combination of

24 - girl with
compact

both practical and emotional needs.

(Pause)

25

What does it take to fill the role of a Citizen

25 - title slide
"Advocate"

Advocate? First of all, a person should examine his

own attitudes toward mentally retarded people. The
words "mental retardation" may bring many varied

images to mind. What kind of person might the pro-
spective advocate picture? A little girl with a big

smile who could be the child who lives next door?

A small boy walking the halls of an institution? A

happy child who can learn to play, take care of her

own needs, and live a full, satisfying life? A

person who does nothing all day, wasting any potential

he may have? A man who has learned vocational skills

and can earn his own living? All of these are pos-

sible images of mental retardation, and whether a

person's concept is positive or negative, learning

more firsthand is the best way to understand what

the family of a mentally retarded child faces.

(Pause)

The most important thing that Citizen Advocates

must remember about their proteges is that they are

human beings, and like everybody else, they have

26 - man hugging child

27 - blond girl

28 - boy with crutches

29 - smiling girl

30 - boy watching TV

31 - man in stockroom

32 - retarded man & woman

33 - baby with parents

34 - two boys playing



35
certain rights that should not be ignored. Just as
everyone is sometimes frightened, lonely, and unable
to cope with his environments, mentally retarded per-
sons also have these emotions. And just like other
human beings, they enjoy having good times, doing
things...accomplishing things...creating things.

(Hold)

39
The difference is that mentally retarded people often
do not have friends to help them participate in com-
munity activities, or act as spokesmen in safeguard-
ing their rights. This is where Citizen Advocacy
comes in.

(Pause)

What pictures does the term "Citizen Advocate"

41
bring to mind? Does it conjure up courtrooms or
soapboxes? Does it sound legal and complicated?

42
Basically, the Citizen Advocate's role involves
getting to know a mentally retarded person, learning
about his problems, and helping him to meet his own

35 - children on
playground

36 - girls on
carriage

37 - girl at piano

38 - gray-haired
woman

39 - boy hiding

40 - title slide,
"Citizen Advocacy"

41 - courtroom

42 - girls ironing

43
needs. But it can also include those soapboxes and
courtrooms because an advocate can see to it that the
needs of his protege are being met by speaking out

43 - courtroom

44
for his rights. The retarded sometimes cannot speak

44 - boy with
sandpail

45
for themselves, and too often, their families are
ignored.

45 - woman with
twins

(Pause)

46
A teenager can be an advocate, and senior citi-
zens can fill the advocacy role, too. So can busi-

46 - teenager work-
ing with boy

48
nessmen who put in a nine-to-five work week, or busy
49
homemakers can serve as advocates. One volunteer

47 - elderly man
with boy

48 - man feeding
boy

49 - pair tying
shoelaces

50
can serve several retarded persons at a time...or a

50 - teenage girl
with children

51
family can serve as an advocate for a single protege.

51 - family

52
The heart of the advocacy concept is the one-to-one
relationship, but a very good thing about the advo-
cacy program is its flexibility.

52 - pair in pool

(Pause)

53
The need for persons to fill the Citizen Advocacy

53 - boy in crib

role is overwhelming for all groups of retarded persons including those who spend all their lives in institutions,⁵⁴ those who move from the institution⁵⁵ out into the community, and those who are already in the community, but are not receiving the benefit of needed services.

A Citizen Advocate, who is ready to work hard,⁵⁶ can help relieve the frustration, boredom, and loneliness of the residents of institutions, and act as a spokesman⁵⁷ for improved conditions and programming in these facilities which often are left out when it comes to advocacy activities.⁵⁸ He can also prevent the unnecessary failure of the former resident to adjust to community life simply because he has no one to show him how and to encourage him through crisis periods.

⁵⁹ The advocate can open doors to a whole world of discovery for retarded persons in the community who⁶⁰ are particularly vulnerable to psychological

54 - boy on bench

55 - boy at window

56 - hands with string

57 - woman's face

58 - boy with head bowed

59 - boy with jar

60 - boy lying on grass

isolation because they usually have few opportunities to form long-lasting relationships. Advocates can

61
fill this need as well as helping to ensure that the retarded person has full access to community programs and services.

(Pause)

62
Specifically, what roles do citizen advocates fill? Of course, the roles of these advocates will vary according to the needs of their proteges. The most informal kind of relationship is that of "Advocate-Companion".

63
64
65
An Advocate-Companion is a friend to his protege, taking him places, and exploring all the true meanings a friendship can have. Advocate-Companions meet the emotional needs of their proteges by introducing them to new experiences and broadening their horizons.

What kinds of things do Advocate-Companions and their proteges enjoy doing together? Examples are

49

- 41 -

61 - dentist

62 - hands clasped

63 - title slide, "Advocate-Companion"

64 - boy carrying child

65 - teenager fixing girl's hair

66 - pair with reflections

going on outings to get to know the community better.

67
..or visiting the lanes to bowl a few frames...get-
68
ting together for a beauty treatment...or just talk-
69
ing over things that concern both advocate and pro-
tege.

70
A second more involved role is that of "Advocate-
Adviser". This relationship is a friendship combined
with providing practical assistance in other areas as
well. The Advocate-Adviser is both a friend and a

71
guide for the protege, teaching him skills involved
in daily life. The advocate may help the protege

72
do simple things related to proper hygiene, or more
complicated endeavors such as getting a driver's

73
license or using the post office.

What kinds of things do Advocate-Advisers and
74
their proteges do together? The activity can be as

75
basic as learning how to tie a shoelace, or the pro-

76
cedures for brushing teeth properly or putting on

67 - bowling
alley
68 - girls with
hairdryer
69 - girls talking

70 - title slide,
"Advocate Adviser"

71 - men with
razor

72 - automobile

73 - post office

74 - tying shoes

75 - boy brushing
teeth

76 - girls putting
on makeup

77
make-up correctly. Or it can be a more complicated task such as measuring the ingredients and following the recipe, or learning how to get around town in order to make it on time to those important job interviews.

79
A different kind of expertise is required of the Advocate-Guardian who will assume a long-term role in watching over the protege and managing an

80
estate or trust fund for him. This kind of advocate can fill some needs for a retarded child now, and can be of even more assistance after the death of that protege's parents.

(Pause)

81
There are also "Emergency or Stand-by Advocates" who function on a crisis basis when an emergency situation arises. But the intervention may prove to be of major importance in the protege's life from that point on.

(Pause)

51

77 - pair cooking

78 - bus

79 - title slide,
"Advocate-Guardian"

80 - man at desk

81 - title slide,
"Stand-by Advocate"

82 - advocate with
black woman

83

Professionals who provide direct services can also participate in the advocacy program as long as their leisure-time proteges are not business-day

83 - man and boy talking

84

clients: When a professional tries to be a Citizen Advocate for someone who is also his client, he may encounter a built-in conflict of interests between

84 - family with professional

what is best for the protege and what the structure of the service system requires. However, profes-

85

sionals can serve well as "Associate Advocates" who advise advocacy programs, try to improve services in their own agencies, and work for community acceptance of the retarded.

85 - woman on phone

86

The roles which Citizen Advocates fill can make a big improvement in the quality of life for mentally

86 - black advocate holding child

87

retarded people. A Citizen Advocate can make the

87 - boys in institution

(read slowly)

difference between a lonely, wasted day

88

in an institutional building, and an exciting excursion

88 - children playing leapfrog

89

sion outside...between doing nothing all the time, or

89 - bedfast child

90
having somebody to play games with, and teach you new

90 - child with large ball

91
things... between feeling that there's nobody to turn

91 - girl on quilt

92
to and having someone to take a splinter out of your

92 - man with child.

93
finger when it hurts... between having no one to

93 - child and swing set

94
push your swing, or having an advocate to start you

94 - child swinging

95 96
off right... between being alone... or feeling that

95 - child kneeling by tree

96 - teenager with girl

somebody cares enough to speak out for you.

97 - 100 (run rapidly)

97 - 100 series of hands reaching out

When a Citizen Advocate reaches out for someone, he is bound to find a protege reaching out to him.

101
NARC slide. (Music fades out.)

101 - NARC title slide



Activity III: APPLYING CITIZEN ADVOCACY TO THE NEEDS OF
MENTALLY RETARDED PERSONS

Purpose: To have the participants consider the specific benefits of Citizen Advocacy for mentally retarded persons.

Steps for Trainer:

step one - distribute CA-1 to participants.

step two - read aloud the instructions for this group activity from CA-1 while the participants read silently.

step three - allow participants 10 minutes to prepare a list of service needs and 20 minutes to prepare an outline for applying citizen advocacy for meeting these needs.

step four - allow a representative from each group approximately 4 minutes to present the outline to other participants.

Applying Citizen Advocacy to the Needs
of Mentally Retarded Persons

Purpose of Activity

You have been exposed to the concept of Citizen Advocacy and some examples of advocate roles. Your task now is to begin thinking about the specific ways in which Citizen Advocacy could be used in your communities.

Procedure

In order to determine the specific ways Citizen Advocacy can serve the mentally retarded persons, you will be asked to consider and answer the following two questions:

- 1) what are the major service needs of mentally retarded persons, and
- 2) how do you see Citizen Advocacy being effectively used in relation to these service needs?

The members of each group are asked to discuss and compile a listing of perceived service needs of mentally retarded persons in their communities.

On the basis of these identified needs, develop an outline which describes the specific ways in which Citizen Advocacy could benefit the mentally retarded residents of your communities. When developing your outline, include the residential facility or institution as a part of a comprehensive service approach.

You will be allotted 10 minutes to review service needs and 20 minutes to develop the outline for using Citizen Advocacy in your communities. A representative from each group will be asked to briefly present the group's outline to the other participants. These reports should be limited to approximately 4 minutes each.

Activity IV: REVIEW OF MORNING SESSION AND OVERVIEW OF
AFTERNOON ACTIVITIES

Purpose: To discuss the relationship between the activities
in the workshop and the contents of the books, AVENUES TO CHANGE
I-IV.

Steps for Trainer:

- step one - read aloud the script entitled "A Discussion
on the Workshop Activities and the Books,
AVENUES TO CHANGE I-IV.
- step two - answer questions relative to the activities
occurring during the first half of the
workshop.

A DISCUSSION ON THE WORKSHOP ACTIVITIES AND

"AVENUES TO CHANGE", BOOKS I-IV

Up to this point in the workshop, we have concentrated on the theoretical or conceptual aspects of Citizen Advocacy. We have studied the basic tenets of the Citizen Advocacy model and have begun to think about some of the specific ways in which this approach could be applied to the needs of mentally retarded persons.

After returning from our break, we will begin discussing some of the more practical aspects of Citizen Advocacy. We will review guidelines for implementing and operating Citizen Advocacy programs. We will also develop plans for disseminating Citizen Advocacy in your communities.

The audio-visual and printed materials which have been presented thus far are supplementary to the NARC Project's series of books on Citizen Advocacy, Avenues To Change, Books I-IV. With these four books and the information you are gaining today, you will have a most comprehensive package to take back with you to your communities to either get the ball rolling there or refine and add to what you have already done in Citizen Advocacy. You will be given this four-book set later in the program but let's briefly review now what they contain:

Book I--"Citizen Advocacy for Mentally Retarded Children: An Introduction" is for a general audience. This book can give a good overview of Citizen Advocacy

to anyone who is interested in becoming involved.

Book II-"Implementation of Citizen Advocacy Through State and Local ARCs" is a step-by-step guide to planning for and operating Citizen Advocacy programs at the state and local levels. It includes forms for use by local coordinators in the various phases of operation.

Book III-"Effective Advocacy" is for the new advocate. It gives him basic information on mental retardation and let's him know what is expected of him and what he can expect from the program. This is the only book in existence at this time that is geared for the advocate himself.

Book IV:-"YOUTH as a Citizen Advocate" is slanted toward the 13-18 age group. It's goal is to recruit Youth Advocates and inform them about the program. It contains a diary account of a fictional, but typical, Youth Advocacy relationship, as well as basic facts about the concept and its implementation.

The material covered in this morning's presentations directly relates to information given in Books I and IV. This afternoon's presentations are keyed toward your later in-depth study of Books II and, III.

Activity V: PLANNING AND OPERATING A PROGRAM

Purpose: to help the participants understand the basic procedures for planning for and implementing a Citizen Advocacy Program and to understand the basic processes of program operation and evaluation.

Steps for Trainer:

step one - read aloud the script "Presentation on Planning and Operating a Program", using the accompanying slide package as indicated. The numbers 1-29 pinpoint spots where the slide should be changed, and the underlining shows the phrase to which each slide is keyed. The trainer may desire to change some of the wording to fit his own speaking style, but the basic content of the script should not be changed.

step two - answer questions concerning the presentation.

PRESENTATION ON PLANNING AND OPERATING A PROGRAM

¹
How often have you heard someone repeat that
²
old refrain, "He can't see the forest for the trees"?
It is hoped that this presentation on planning and operating a local Citizen Advocacy office will help you to see both "the forest and the trees" as you try to develop an action program that maintains the basic tenets of Citizen Advocacy. It's very easy to get so involved in details that you get side-tracked from your main goal. Or, a program developer can try to safeguard the concept so rigidly that good opportunities for actually implementing it are lost.

By listening carefully and participating in our earlier sessions, you have already taken the first important step in starting a Citizen Advocacy program. It's important to keep the program a true Citizen Advocacy effort and not let it become just another agency-type service, or a ³
clearing-house for coordination of traditional volunteer activities. In initiating and maintaining an office, there are several very important points to keep in mind which have been learned through a study of Citizen Advocacy programs already established. By sharing them

1--Dark

2--Forest of trees, each representing some aspect of Citizen Advocacy

3--Cartoon of advocacy clearinghouse

with you now, we hope we can help you avoid some of the problems experienced by these initial Citizen Advocacy offices.

4

This discussion will deal in a skeletal form with procedures that have been basic to the majority of Citizen Advocacy programs started so far. The NARC Child Advocacy Project staff has taken a cross-section of methods used by several programs, since there have been variations in means of implementation, and added its own proposals to them to come up with a composite local model for an average community. There are, however, other models which are discussed in detail in the series, Avenues To Change, and you will be able to study them when you receive the books later in this workshop. Book II of the set is especially relevant to this presentation.

(Pause)

One of the first steps that a local ARC should take when considering the establishment of a Citizen Advocacy office is to determine what other advocacy activities, if any, are currently going on in the city and state. If the state has already established a ⁵State Citizen Advocacy Office, the local ARC should visit that office to set up the necessary lines of communication and benefit

4--Dark

5--"State Office"
surrounded by
question marks

from their resources. The local unit will also want to make sure that no other group has already started a Citizen Advocacy program for the mentally retarded in their locale in order ⁶ to prevent overlap and confusion on the part of the public if two or more Citizen Advocacy programs try to operate simultaneously. Perhaps a cooperative effort could be arranged, or if one of the programs isn't really following the Citizen Advocacy model, it should change its name.

(Pause)

⁷ Another initial step in starting a local Citizen

Advocacy office is, of course, to secure sponsors for the program. As we pointed out earlier, the ARC is the most logical implementor. An interested citizen or member of the local ARC can approach the ARC Board and propose that a Citizen Advocacy program be established in that community. If the ARC doesn't feel that it can carry this responsibility alone, it should consider sharing the load with other local civic groups, service clubs, or sister organizations for developmentally disabled persons. This cooperation will often work in your favor in gaining operating dollars, since some funding sources prefer to support programs that aid all groups of the developmentally disabled.

6--Confused person looking at more than one Citizen Advocacy program

7--Title slide including steps in starting a program

(Pause)

One of the major reasons some programs for the mentally retarded fail is because the community is not sufficiently prepared ahead of time. In many instances, a full realization of the need for community awareness occurs after the program is already underway and ⁸ failing--and it is then too late to do anything about it. Since it is vital that representatives from a variety of areas of community life be included from the planning stages on into the establishment phase, the local ARC should appoint an Advocacy Study Committee composed of ARC leadership, representatives of other local groups for the handicapped, and members of the professional community as well as representatives of youth groups, families of mentally retarded persons, mentally retarded individuals themselves, and members of various ethnic groups.

⁹ If there is a residential facility in your town, be sure to include representatives of their staff and parent groups on your Study Committee as well as personnel from local protective service agencies. Don't water down the Citizen Advocacy concept in order to get a foot in the door with these people, but do assure them that Citizen Advocacy should not be seen as a threat to their systems, but can in reality enhance their efforts.

8--A sick tree, representing a failing program

9--Citizen Advocacy representative shaking hands with institutional representative.

10

The people listed earlier form a suggested list of Study Committee members. The actual committee should not consist of more than 15 - 20 people since too large a group is unwieldy. It should be kept in mind that, at a later time, some of these people can serve in a consultative capacity on the program's continuing Advisory Committee. Be selective and make sure that your Study Committee members are willing to work hard and lend more than their names to the program.

11

Once the Study Committee has been formed, its function will be three-fold: first, to determine the need for a Citizen Advocacy office in the community and to gauge community acceptance and potential for protege referrals; second, to check out possible sources for funds and to prepare a grant proposal for one or more of these sources; and third, to look around for a possible site and staff for the local office.

In judging the feasibility of starting a Citizen Advocacy program in a community, the Study Committee members should personally contact local agencies which provide services for the mentally retarded in order to determine how many persons in the area could conceivably benefit from having advocates. Since many retarded people may be receiving services

10--Dark

11--Tree with branches that indicate functions of the study committee

from several programs, care should be taken to avoid overlap in estimating numbers of potential proteges. It should also be remembered that not every mentally retarded person needs an advocate. Groundwork can be laid at this time for later referrals of proteges to the Citizen Advocacy office by these agencies.

One important caution to be given to the Study Committee is that they should not view their initial endeavors to measure community reaction to Citizen Advocacy as full-fledged campaigns geared at recruiting advocates and proteges. The idea behind this first thrust is to form a broad base of knowledge and support in the community for a Citizen Advocacy program so that when the office is actually ready to go into operation, all of this very necessary ¹² foundation will already have been laid, and action can take place immediately. Some programs have found that if too much early general publicity appears during this phase, persons interested in the program will respond before an office has actually been set up. Then, their initial enthusiasm wears thin before they can really do something with their energies.

(Pause)

¹³
The next important area for the Study Committee to consider is funding. Funds can be garnered from

12--A person representing the Study Committee laying a foundation for C/A.

13--Mixture of dollar signs with the words "Federal", "State" and "Local".

the federal, state, and local levels, and the Study Committee should thoroughly check possibilities of each. Since funding priorities and regulations vary so much from state to state, it is difficult to cover all funding angles. Book II of the Citizen Advocacy series discusses all three levels and gives reference points for you to use as springboards for your own investigations.

Whatever funding sources are available, it is absolutely essential that the local program not be funded through any means that could possibly cause ¹⁴ conflicts of interest to arise between the advocacy office and its funding source. In just a few minutes, you will be given the opportunity to critique a sample narrative and budget for a Citizen Advocacy grant in order to emphasize certain points which assure that a funding proposal jells conceptually and programmatically.

(Pause)

15

One of the final functions of the planners for a local Citizen Advocacy office is locating an office site. The office should be located in a place easily accessible to those it will serve, and it should be situated independently from any local service-delivery agency to prevent conflicts of interest. So far, some programs have either rented office space or found a community volunteer center, church, business

14--C/A program and funding source in tug-of-war,

15--Man planting a tree representing Study Committee locating an office site.

or club who were willing to donate the necessary space. Some local advocacy programs are located under the same roof as the local ARC.

16

The Study Committee should also make contacts at this time concerning prospects for the position of local coordinator so that when funding does come through, the program can be launched without delay. From the experiences of most other Citizen Advocacy programs, it is deemed advisable to hire a full-time salaried local coordinator from the inception of the program.

At this point, the planning stages of the program end, and, when funding is received, the actual operation of the office can begin. ¹⁷ On the screen now are the basic steps for operation of a Citizen Advocacy program. One of the first things the local staff should do is to organize the Advisory Committee which will provide guidance for all phases of the program. Members of this committee should come from among the same groups that were listed earlier as we discussed planning a program. In fact, the coordinator may wish to select some members of the Study Committee to form the Advisory Committee.

The Advisory Committee should be viewed as a consultative and resource body rather than as a policy-making, governing Board for the program, and its functions should include ensuring cooperation

16--Dark

17--Title slide -
"Steps In
Operating A
Program".

between the Citizen Advocacy program and community members. Members of the Advisory Committee should stand ready to assist both the coordinator and the advocates when problems arise that fall within the members' areas of expertise. This Committee should be kept as small as possible while still ensuring that its members adequately represent consumers and obtainers or providers of mental retardation services.

(Pause)

18

For the program just starting, mentally retarded persons needing advocacy services should be identified and located before recruiting advocates so that names of proteges will be on file and ready for assignment once advocates have been recruited and trained. Locating proteges will not be an extremely difficult task if the community has been properly prepared for the program. Many existing offices have found that providing information on Citizen Advocacy will result in spontaneous referrals from service agencies and residential facilities, as well as from parents.

In order to ensure as much as possible that all referral sources are made aware of the Citizen Advocacy office, the staff should individually contact

18--Title slide -
"Protege
Recruitment"

all agencies in the community in person or by phone to ask for their cooperation.

(Pause)

19

A more thorough effort will be required for recruiting advocates than is generally necessary for locating proteges. Strategies for finding advocates include preparing newspaper articles, radio and TV spots, brochures, and informational fliers; lecturing to small groups; making individual contacts; and taking advantage of word-of-mouth publicity. Whatever strategies are used, it is very important that the advocacy office provide adequate follow-up to draw advocates into the program.

Once a few advocates have been recruited, they will generally enhance recruiting efforts by telling their friends about their advocacy experiences. Citizen Advocacy then becomes something that the next-door-neighbor does, re-enforcing its image as an attractive activity for other members of the community.

(Pause)

21

After the advocate is recruited, the next series of procedures includes screening, selecting, training and matching. All of these steps are essential to a successful program.

Screening is the process of interviewing applicants who want to become Citizen Advocates to

19--Title slide -
"Advocate
Recruitment"

20--Two women talking over back fence

21--Three-dimensional blocks represent screening, matching, training and selecting.

determine if they have the interest and time to become sufficiently involved in the program. Without proper screening procedures, the local coordinator ²² would really be going out on a limb when it comes to advocate selection. The local coordinator should answer any questions the potential advocate has at this time and provide the applicant with sufficient information to indicate the basic requirements and what can be expected in certain advocacy roles. ²³ During this initial interview session, the local coordinator should also ask questions about the reasons a person wants to be an advocate, the attitudes he may have toward retarded persons, and the amount of time he could devote to the relationship. References are also requested from the prospective advocate.

The screening process also helps determine which applicants may have poor intentions or unrealistic expectations. In the programs established thus far, there have been few cases where an undesirable individual has sought entrance into the program for the wrong purposes, but the staff should be alert to such possibilities.

The final step in screening is the decision to accept or reject an applicant, and the prospective advocate should be notified as quickly as possible.

22--Illustration of C/A coordinator out on a limb.

23--Title slide - "Advocate Screening"

If he is rejected, reasons why should be explained, and if he is accepted, he should be approached in an enthusiastic manner and given specific information regarding the next steps to be taken toward becoming an advocate.

(Pause)

It is essential that training sessions be conducted to prepare new advocates for their roles.

Without proper training, the advocate ²⁴ could be really up a tree about what to do in certain situations in the relationship. The careful training of the advocate is one of the most important characteristics of Citizen Advocacy. Training for advocates is, however, unfortunately one of the most neglected areas in many of the ongoing Citizen Advocacy programs.

24--Advocate up a tree.

²⁵ The newly recruited advocate should be scheduled for training sessions as soon as possible after being accepted. It is recommended that these novice advocates receive at least four hours of training covering such topics as basics of mental retardation; incorrect stereotypes, labels, and attitudes toward retarded people; service needs of the retarded and other developmentally disabled persons; and how advocates can fill useful roles in meeting these needs.

25--Title slide - "Advocate Training"

(Pause)

²⁶

There is considerable controversy regarding the

26--Figure representing C/A Office standing behind advocate to back him up.

extent to which advocates should be monitored in their activities. There is, for example, the belief that since the advocate is a free agent who is a volunteer to a person and not to an agency, the Citizen Advocacy Office should not monitor the advocates' and proteges' activities. In effect, this means that the advocate cannot be controlled or removed from his assignment by the Citizen Advocacy program staff.

On the other hand, there is the stance that monitoring is an essential function of the Citizen Advocacy Office because there must be checks and balances in the system to ensure that the best interests of mentally retarded persons are being served. The second approach implies definite control over the advocate from the standpoint that a relationship can be ²⁷ terminated if the Citizen Advocacy program personnel or members of its Advisory Committee can document negative effects on either the advocate or the protege.

The NARC guidelines take the second approach. If problems are observed in a particular relationship, the local coordinator should counsel with the advocate and the protege in order to correct the situation. When counseling cannot improve a relationship which is detrimental to either party, then

27--Outlines of advocate and protege crossed out with an "X".

the coordinator may consider dissolving the relationship.

28

Sound monitoring and evaluation procedures

28--Title slide
"Monitoring and
Evaluation"

should be developed in order to assess the effectiveness of the individual advocate-protege relationships and the overall efficiency of the program. Advocates should be encouraged to complete monthly reports which reflect the activities of the pair and the amount of time involved. These monthly reports should be compiled by the Citizen Advocacy program staff in order to evaluate the program as a whole. Additional staff-related information, such as agencies contacted, lectures made, and problems encountered, should be compiled in order to document the activities of the local office.

(Pause)

29

29--A thriving forest
of advocacy
programs.

In this presentation we have highlighted some of the important aspects of planning and operating a Citizen Advocacy office. Emphasis was placed on careful initiation of the program, the screening, selecting, training, matching, and monitoring processes, and evaluation and documentation of office operation. Hasty measures to start and maintain a Citizen Advocacy program will only result in serious operational difficulties after the office has been going for a while. Laying careful groundwork and

utilizing sound, workable procedures for its operation will pay off handsomely in successful advocate-protege relationships, and those seedlings will grow into sturdy forests for the future.

Activity VI: CRITIQUING A PROGRAM DESCRIPTION

Purpose: To help the participants develop evaluative skills relating to the planning and implementation of Citizen Advocacy Programs.

Steps for Trainer:

- step one - distribute CA-2 and CA-2a to participants.
- step two - read aloud the instructions from CA-2 for this group activity while the participants read silently.
- step three - allow the participants 15 minutes for individual study of the program description and 30 additional minutes for group discussion.
- step four - allow a representative from each group six minutes to orally present an outline to the other participants.
- step five - distribute CA-2b to participants and indicate that these are problems which should have been identified.

Critiquing A Program DescriptionPurpose of Activity

We have discussed characteristics of the Citizen Advocacy approach which distinguish it from other volunteer efforts. The concept specifically provides for safeguarding the rights and interests of mentally retarded persons and helping ensure that their service needs are adequately met. Sound planning for the Citizen Advocacy effort is essential if effective programs are to be established. The purpose of this activity is to strengthen your evaluative skills in regard to designing a program which is based on the Citizen Advocacy concept.

Procedure

You have been provided a brief program proposal which includes a one-year budget. The sponsor is hypothetical, but the program description is based on several actual proposals for Citizen Advocacy programs across the nation. Each individual should study the program description and budget, and mark the sections which seem questionable either regarding consistency with the Citizen Advocacy concept or concerning practical aspects of implementation or budgeting. Fifteen minutes is allowed for this individual study. Then you will assemble in your same groups, and each group will discuss the sections marked by each member and compile a list of the problems determined. Thirty minutes will be allowed for this.

A representative of each group will be asked briefly to present the group's outline to the other participants. These reports should be limited to 6 minutes each. If a group report given prior to your's covers similar material to your group's report, please give us only new materials which no one has mentioned thus far.



PROPOSAL FOR GROUP CRITIQUENarrative: How Program Meets Needs of Retardates

Since there is such a great need for a Citizen Advocacy program in our community, we are applying for funding for a program which will give retardates living in community residences a friend who will look out for their interests in the outside world. This program will provide a basic need for 1 retardates who are leaving state institutions to live in community residences. It is planned that this program will serve as a pilot for future programs of this nature in the state. Citizens in our community are not really aware of retardates and their problems, so we want to establish a volunteer program called "Friend-To-Friend" which will enable these victims of mental retardation to receive the necessary services as they try to adjust to community life.

Volunteers will be helped to build healthy, individualized indepth relationships with retarded people, relieving their social isolation. They will be non-paid friends who really learn to like their proteges (retardates to whom they are assigned). 2 It is expected that the advocate will make the protege feel that he is liked and accepted for no other reason than "he is liked". This Citizen Advocacy program will enlist interested persons in the community to provide caring relationships such as friend, parent, neighbor, roommate, grandparent, etc.

Volunteer advocates may not be formal counselors, but what they do could amount to counseling. They may also assist the parents of a protege to obtain needed education or training, and may give informal counsel or practical assistance (i.e., transportation). An example would be for a citizen volunteer to help the retarded friend obtain needed health services by observing the need for medical attention, making the necessary contacts, affording transportation, and informally urging follow-through on medical recommendations. Once advocates get to know retardates, they can recommend areas of training needed by proteges to parents and professionals. The advocate will have knowledge of resources in the community which he can refer his friend to. He may be helpful in offering information directly about services available to his friend in the community. If the protege has no service needs, the advocate can bring cheer into his life through visits, phone calls, letters, outings, etc.

Procedure: How Program Will Operate

The first step will be meeting with the ARC Board of Directors to explain the program and ask for their support. They, in turn, will then appoint a Study Committee made up of representatives of the community organizations who have expressed a desire to participate. This committee will meet to get acquainted and become knowledgeable about Citizen Advocacy. They will then begin to implement the program by planning for public relations,

funding, a speakers' bureau, and volunteer recruitment. This Study Committee should also enlist the support of other leading and concerned citizens who will form an Advisory Committee to the program after it gets underway. This Advisory Committee may consist of leading community citizens who can lend their names in efforts to secure broad-based support for the program.

The Study Committee will proceed to activate an intense publicity campaign utilizing all media resources as well as
5 setting up a Speakers Bureau to go out and lecture to interested groups. The purposes of these publicity efforts are to increase public support and recruit potential advocates.

The next step we propose is to hire the Citizen Advocacy office staff. We want to recruit a program director, two assistant directors who will act as advocacy caseworkers, and a secretary to handle all the heavy load of paperwork that is anticipated. As the publicity effort produces potential advocates, these staff members will begin the continual process of
6 screening and training advocates, screening the protege clients, assigning advocates to proteges, and providing support to these relationships. Our goal is to establish 100 of these matched relationships in our first six months of operation. In cases where individual advocates cannot immediately be found for mentally retarded clients and their families, the protege will be temporarily matched with one of the advocacy caseworkers who will act as his advocate until one can be found.

PROPOSED BUDGET

PERSONNEL RELATED

Director \$ 13,500
Assistant Director (2) 18,000
Secretary 6,500

TOTAL SALARY \$38,000

Fringe Benefits based on 12% of total salary
(FICA, health insurance, Workmen's Comp., etc.)

4,560

TOTAL PERSONNEL RELATED \$ 42,560

OFFICE RELATED

Equipment 650
Postage 150
Communications 500
Consumable Supplies 600

TOTAL OFFICE RELATED 1,900

PROGRAM RELATED

Travel 500
Consultation 250

TOTAL PROGRAM RELATED 750

TOTAL PROGRAM COSTS \$ 45,210

CONCERNS THAT SHOULD HAVE BEEN IDENTIFIED

Paragraph #1--

1. Demeaning terminology is used regarding mentally retarded persons, e.g., "retardates", "victims of mental retardation". (Such terms are found throughout the text of the proposal.)
2. It appears that the program is only planning to serve mentally retarded persons who are leaving institutions to live in the community. This scope is much too limited.
3. The program is referred to as a "volunteer program" and is called "Friend-To-Friend". This makes it sound like a traditional volunteer program that is geared toward establishing only friendships and recreational type relationships.
4. The reasons or means for determining the need for Citizen Advocacy in the community are not given.

Paragraph #2--

1. The term "non-paid friends" is misleading. Is there such a thing as a "paid friend"?
2. The fact that the advocate is "expected to make the protege feel that he is liked and accepted", etc. does not leave much room for the growth of a normal relationship with the mutual give-and-take that occurs in any true friendship.
3. The roles for advocates, i.e., "friend, parent, neighbor, roommate, grandparent" do not cover all the real possibilities for advocacy roles and are not good examples. The legal roles for advocates are not even mentioned.

Paragraph #3--

1. The function of the advocate as given here seems to relate more to the parents of the protege than to the protege himself. The functions of the advocate are also too service-delivery oriented. Advocates are supposed to monitor services and be sure their proteges get the needed services: having an advocate provide the services himself either casts him in the role which a professional should be filling ("counseling" or "observing the need for medical attention") or turns him into the kind of volunteer who is only expected to do things like providing transportation services for a retarded person. The advocate is not likely to have the knowledge to recommend protege training needs to parents or professionals, nor

is he likely to know all community resources available to the protegee, especially if he receives no formal advocacy training as this proposal seems to indicate. The last sentence in the paragraph defines a purely expressive role for the advocate and makes him sound like part of a "Big Buddy" program. To summarize the problems in this paragraph, we can say that there is no clear-cut definition of advocate roles. It is confusing and misleading.

Paragraph #4--

1. It appears that persons who will make up the Study Committee will only be chosen from among those who "have expressed a desire to participate". There is no effort to recruit "new blood" for this Committee.
2. The reasons for the initial meeting of the Committee are first, for them to get acquainted, and second, for them to learn about Citizen Advocacy. This is a poor way to assign priority.
3. The Study Committee does not actually implement the program itself. It plans for the program.
4. The Study Committee should not be responsible for appointing the Advisory Committee.
5. The Advisory Committee should be willing to do more than "lend their names" to the program.

Paragraph #5--

1. A Speaker's Bureau is mentioned here with no method indicated for training them about Citizen Advocacy.
2. Recruiting potential advocates is also mentioned, but there is no method shown for locating proteges. It appears that advocate recruitment will begin before the program is ready to handle it.

Paragraph #6--

1. Too many staff members are proposed for a beginning program. This number calls for too large a budget.
2. "Advocacy caseworkers" is a term that indicates an agency orientation for the program.
3. It is implied that the office will have an overly complex system of record-keeping, producing "the heavy load of paperwork".
4. There are no details given on how advocates will be screened and trained, how they will be matched to proteges, or how support will be provided for the relationship. The use of the term "assigning advocates" also implies an agency orientation.

5. The goal of 100 matched relationships in six months is unrealistic and implies that quantity is given priority over quality in the screening and matching of advocates.
6. The use of the term "protege clients" shows an agency orientation.
7. The idea of having advocacy caseworkers who serve as temporary advocates is not a good idea because it puts the emphasis in the wrong place regarding the functions of the local office. The local office monitors relationships, recommends resources, etc.

General -- It is apparent that the grant-writers have not actually thought through what procedures they would use in implementing this program. Specific goals and realistic objectives are not given. Many areas are only touched upon, such as advocate training, while others are left out all together, like the actual obtaining of funds. No effort is indicated to involve minority or low-income groups in this program, and it sounds very "white, middle-class". As mentioned before, the scope is very narrow, and there is no outreach for retarded persons remaining in institutions, or for those who have never been in institutions. There is also no system indicated for evaluation and replication of the program.

Budget --

1. Too much money is allocated for salaries for a small, beginning program. Perhaps the Assistant Director could be added at a later date after the office is well established.
2. Figures for equipment, postage, and communications are too low.
3. Travel funds are too limited.
4. No mention of how the \$250 consultation monies will be utilized is made in the narrative.
5. No money is budgeted for obtaining office space or securing insurance coverage.

Activity VII: AN ACTION PLAN FOR ESTABLISHING A STATE OR LOCAL
ADVOCACY PROGRAM

Purpose: To obtain commitments and action plans for implementing
Citizen Advocacy at state and local levels.

Steps for Trainer:

- step one - Read aloud the instructions for this activity from CA-3 while the participants read silently.
- step two - If several local units are represented, regroup participants so that each local unit's representatives are grouped together.
- step three - Allow the groups 30 minutes to develop their action plan.
- step four - Allow the representative from each group 5 minutes to present the plan to other members.

An Action Plan for Establishing a State or Local
Citizen Advocacy Program

Purpose of Activity

Citizen Advocacy programs have been established independently in various areas of the country. Many of these have been developed on a trial and error basis, and modifications have been made as programs developed. Fortunately, we now have the benefit of the experiences of these pioneering Citizen Advocacy projects. The national component of NARC has compiled various available information and added some new materials to form the basis for the training package being presented to you in this workshop. The purpose of this activity is to elicit an effort from you to plan for Citizen Advocacy implementation in your state or community. We will now ask that you develop detailed plans of action for this purpose.

Procedure

Regroup, if necessary, to ensure a mixture of professions, expertise and interests within each group. (NOTE: If this is a state workshop where several communities are represented, rather than a local workshop for just one community, regroup so that persons from the same home community are seated together.) Representatives of each unit are asked to develop specific plans for getting a Citizen Advocacy effort off the ground in your area. This includes indicating target dates for conducting additional workshops, soliciting funding, setting up Study and Advisory

Committees, gaining publicity, etc. Persons who will be responsible for each step should be indicated. Carbon packs are being provided so that an original and two copies of the plan can be made. Your group should keep the original and give the two copies to the trainer who will forward them to the appropriate state, regional or national level.

You will be allowed 30 minutes to develop your plan, and a representative from each group will then be asked to present a brief outline of the plan to other participants. Please limit these reports to five minutes each.

Activity VIII: WORKSHOP SUMMARY AND EVALUATION

Purpose: To obtain evaluative data for workshop improvement and to indicate the need for participant action after the workshop.

Steps for Trainer:

step one - distribute "information sheet" and request that all participants complete the form.

step two - collect completed information forms.

step three - indicate appreciation for participation and present closing remarks from the script for "Workshop Summary".

INFORMATION FOR IMPROVING THE WORKSHOP

We would appreciate some comments concerning this workshop in order that we may know if certain changes are needed to improve future sessions. Please be as frank and specific as possible. (Feel free to use the reverse side if additional space is required.)

1. What is your reaction to the content of today's workshop?

2. Do you feel that you have been adequately prepared to further disseminate Citizen Advocacy?

3. Was the workshop organized in a logical and functional manner?

4. Was the pacing of the workshop satisfactory? _____

5. What is your opinion of the audio-visual materials utilized (film and slide presentations)?

6. Was there anything you particularly disliked about the workshop?

7. What improvements would you suggest for future workshops?

8. On the whole, how do you rate the workshop?

Poor

Mediocre

Satisfactory

Good

Excellent

(You are not required to sign your name)

Thank you for your attendance and participation

CLOSING REMARKS

This workshop was intended to fulfill a two-fold purpose:

1) to familiarize you with an exportable training package which can be used to conduct other Citizen Advocacy training workshops, and 2) to teach you how to use these materials to set up Citizen Advocacy programs. For some of you, today may have constituted a first formal introduction to Citizen Advocacy. It is hoped that this workshop has inspired in you the desire to implement the concept in your locale, regardless of your previous status as a novice or an expert on the subject of Citizen Advocacy.

There are several points we would like to re-emphasize in closing. First, you should start now to formalize and carry forward on your implementation strategies. Due to the complexities and time involved in funding processes, the sooner you get started, the better. Second, in planning the implementation of your project, bear in mind the importance of adhering to the basic tenets of Citizen Advocacy as outlined for you here today. Don't fall into the trap of becoming just another traditional volunteer program instead of a real advocacy outreach. Third, avoid conflicts of interest when planning your funding strategies and selecting an office location. Don't put yourself in the position of being under the dominance of any agency or service-providing group that might hinder efforts by advocates to improve services and speak out for the rights of mentally retarded people.

If any problems or questions arise, or you wish to obtain additional training materials, contact your State ARC Executive

Director or your Regional Representative who will either be able to help you themselves or refer you to the proper source for aid.

We deeply appreciate your participation and cooperation in this workshop and will now answer any questions you may have regarding any of the activities on today's agenda.

SECTION III

APPENDICES

APPENDIX A

Citizen Advocacy Training Workshop:
Materials Checklist

The following checklist includes all necessary materials and equipment for a Citizen Advocacy Training Workshop, based on an average-sized workshop of 40 participants.

To be furnished in training workshop package from regional offices--

- _____ sufficient sets of Avenues To Change for participants (40)
- _____ workshop manuals for trainers (2 per 40 sets of books)
- _____ 1 copy of the 16mm film, Something Shared
- _____ 1 slide presentation, Citizen Advocacy: An Answer for Thursday's Child, along with accompanying cassette tape and script for projectionist.
- _____ 1 slide presentation on Planning And Operation Of A Citizen Advocacy Program
- _____ 1 set per participant of the hand-outs C-A 1, 2, 2a, 2b, 3 and 4

To be secured by trainers--

- _____ 1 16mm sound movie projector
- _____ 1 16mm take-off reel for projector
- _____ 1 35mm automatic focusing carousel slide projector
- _____ 2 small tables for projectors
- _____ 1 movie screen for both projectors (6 x 6 foot) or (1 for each projector if possible).
- _____ 1 small flashlight for person showing slides with script. (This is not necessary if synchronized slide tape is used.)
- _____ 1 map pointer for use with slides in Planning and Operating a Program presentation

- _____ 5 sheets of paper (8 x 11 inch) and 2 pencils per participant
- _____ 6 carbon packs (or 1 for each local or state unit represented). These are to be used for recording local or state action plans.
- _____ 1 blackboard (approximately 4 x 6 feet), chalk, erasers
- _____ 6 large sheets of paper (28" x 34") for each group (if blackboard if not available), masking tape, 6 black felt pens for recording group reports.
- _____ 1 table and chairs for trainers
- _____ 1 table lectern with light and microphone
- _____ tables (preferably round) which will accommodate 6-8 persons each and chairs
- _____ roll of tape, scissors, paper clips, rubber bands, pens
- _____ glasses, water, ash trays
- _____ arrangements for coffee breaks

APPENDIX B

Physical Arrangements of Room for Workshop

Screen for
Film

Blackboard

Screen for
Slide Show

Table for
Materials

16mm movie
projector

35mm carousel
slide projector
and table

6 ROUND TABLES

CHAIRS FOR APPROXIMATELY
8 PARTICIPANTS EACH TABLE

APPENDIX C

Suggested Letter for State and Local Workshops

The following letter may be used to invite local ARC representatives, members of sister organizations such as United Cerebral Palsy Associations, Epilepsy Foundations of America, etc., and other individuals or groups to attend state or local workshops.

Dear _____:

This is an invitation for you to attend an important training workshop which will provide detailed information on the Citizen Advocacy approach. This one day training session is scheduled to occur on (date), from (time) to (time) at (place).

The U.S. Department of Health, Education, and Welfare awarded NARC funds to develop a comprehensive training package which would enable state and local ARCs to establish Citizen Advocacy Programs for mentally retarded children and adults. This session will also assist affiliates of other health organizations to develop Citizen Advocacy approaches for additional groups of developmentally disabled persons.

During the workshop you will be provided with printed materials which describe in detail the conceptual and programmatic aspects of Citizen Advocacy as well as the procedures for planning and establishing programs based on this model. This information will be supplemented by a movie on the concept, a slide presentation on advocate roles, and brief lectures on implementation procedures.

Citizen Advocacy is an extremely important approach for safeguarding the rights and interests of those who cannot adequately represent themselves and have no one to intervene on their behalf. I am sure that you, as a concerned citizen, will want to attend this session and receive the materials available in the workshop.

Please indicate on the enclosed postcard as soon as possible your intentions for attending this training workshop.

Sincerely,