


For Whom?
By Whom?
For What?
Against What?
How Done?

Individual
Systemic
Citizen
Advocacy



***TOWARDS
PRINCIPLED
EVALUATION
OF ADVOCACY***

Principled: Having guiding rules for right behaviour of method or practice – ethical, upright, just, moral, honourable

Coherent: Having natural well-reasoned connection of parts - logical, rational, sound, consistent, articulate, lucid

ADVOCACY DEVELOPMENT NETWORK

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SECTION 1. ABOUT THE EVALUATION OF ADVOCACY

1. Background To The Project

Acknowledgement of the need to be accountable

Combined Advocacy Groups of Queensland with vision and roots in social advocacy

Commitment to principled, regular, independent external evaluation

Agreement to principled evaluation

Advocacy organisations in Queensland have always acknowledged the need to be accountable, not only in what we do, but also in how we go about our work. In 1992 all advocacy organisations operating in Queensland came together to form a statewide group to explore, develop and promote a common position on advocacy values and principles, as well as to consider accountability issues. This group, known as The Combined Advocacy Groups of Queensland, (CAGQ), also saw the need to offer support and guidance to one another so that advocacy would be developed and strengthened, remaining true to its vision and roots in social advocacy and not sliding into being just another support service working with people with disability.

Over the past decade the number of organisations involved in CAGQ has grown to 13 funded organisations and 2 unfunded organisations. The group now covers a range of individual, citizen and systemic advocacy approaches across the State with funding coming predominantly from either the Commonwealth or the State Governments, or in some instances from both.

At the June 2002 gathering of governing committee members and staff of advocacy organisations involved in CAGQ, people agreed to work towards developing a shared vision and practice of advocacy and to explore what it would take to do principled and coherent evaluation in Queensland. The approach would need to take into account the different forms of advocacy yet remain true to social advocacy's intent. As part of this process all agreed that they were committed to regular, independent external evaluation of advocacy organisations every 3 to 5 years, which would address a number of elements.

All CAGQ organisations agreed in principle to:

- *Comply with the generic principles of social advocacy*
- *Consider these in relation to adherence to their organisation's mission and goals*
- *Examine their ongoing viability and effectiveness as an advocacy group.*

(CAGQ, June 2002)

Combined Advocacy Groups of Queensland

*Queensland Advocacy Incorporated, QAI,
statewide*

*Queensland Parents for People with a
Disability, QPPD, statewide*

Multicultural Disability Network, statewide

*Advocacy Development Network, ADN,
statewide*

North West Advocacy, Mt. Isa

Rights In Action, Cairns

Mackay Advocacy, Mackay

*Independent Advocacy in the Tropics, IAT,
Townsville*

*Regional Disability Advocacy, Toowoomba
Gold Coast Advocacy Group, GCA, Southport*

Speaking Up For You, SUFY, Brisbane

Capricorn Citizen Advocacy, Rockhampton

Sunshine Coast Citizen Advocacy, Woombye

Citizen Advocacy, South West Brisbane

Citizen Advocacy, Inner City Brisbane

Over the years some advocacy organisations have decided to undergo their own external evaluations and have put resources towards this process. (For example, QAI, IAT, NWA, SUFY, CCA, SCCA.) Usually these have taken the form of a team of people involved in advocacy, as well as other allies, becoming immersed in the work of the organisation for a few days. The evaluation team typically tries to get a sense of the organisation from a range of different perspectives in an attempt to evaluate what it takes to provide principled and coherent practice on behalf of people with disability who are vulnerable, as well as examining a range of areas pertinent to advocacy governance and management.

While some organisations have had external reviews, others have developed processes of reflective staff practices or of internal review. For others, the requirements of funding bodies have driven the appraisal of their work with evaluation being seen as an event rather than as an ongoing process of principled reflective practice. As such, the state of the art is not well defined.

The result has been that each advocacy organisation appears to have developed its own idiosyncratic framework and methods of evaluating practice, some more rigorous than others. Where this has happened people have mostly used personal networks to develop processes, or for citizen advocacy, ensuring that the recognised tool, The Citizen Advocacy Program Evaluation Standards, (CAPE) is used as the basis for evaluation.

2. What Advocacy Organisations Have Been Doing In Relation To Assessment

**No shared position –
Each organisation with its
own idiosyncratic way of
evaluating practice**

3. Meeting Funding Body Standards

Having to fit with
standards developed for
disability services

Recommended review
process

Difficult to measure
outcomes from advocacy

The influencing role of
advocacy, with no direct
control over outcomes

Although funding bodies have required evaluations of all advocacy organisations for many years, these have been based on the Commonwealth's general Minimum Service Standards, developed originally for employment services. During the last decade, people involved in advocacy have held many discussions with bureaucrats about the inadequacies of these standards in relation to principled and coherent advocacy performance.

Nationwide gatherings and commissioned reports during this time have also acknowledged the need for development of a framework for evaluating advocacy effectiveness, from an advocacy perspective. (For example the Cross and Zeni Report, 1993, The MGM Consultants Report 1995 and the National Disability Advocacy Program Review Report, 1999.)

The MGM Consultants Report (1995) recommended that funding bodies require and fund advocacy organisations to undertake a review process at least every five years. In order for this to happen they suggested that advocacy organisations should negotiate their process of review and submit a proposal outlining the following:

- Purpose of the review
- General parameters
- Rationale and methodology
- Participation mechanisms for all stakeholders
- Strategies for supporting participation
- Costing
- Reporting processes
- Reporting framework.

Advocacy organisations have found assessment of performance difficult and inappropriate when viewed from the funding bodies' managerialist frameworks. These set expectations for evidence of direct outcomes for people with disability and expect quantitative data to validate underlying unit costing. As the basis of the advocacy work is around striving to influence political and other key agendas to work in the best interest of people with disability who are highly vulnerable, these frameworks remain at odds with advocacy practice, as was recognised in the MGM Report (1995).

Advocacy organisations work almost solely in an influencing role, and generally have no direct control over outcomes. Direct power in relation to issues picked up by advocacy organisations lies in the hands of others, such as government and service providers.

Thus it is not reasonable to expect advocacy organisations to take responsibility for producing outcomes over which they have no direct control. Measuring the extent of influence of an advocacy organisation in the achievement of particular outcomes is difficult.

More recently governments have moved towards a quality assurance model, but still the fundamental tenets are related to other paradigms. Some agreement has been reached with the Commonwealth funding body that the Disability Service Standards can be reconfigured for self-assessment, which still address the standards, but are more in line with how advocacy might portray itself. (For example, see QAI, 2002)

However these compromises are reached by discussion and mutual agreement at an organisational level rather than being seen as the norm. Where both the Commonwealth and the State fund an advocacy group, the organisation must comply with different sets of requirements and timing to meet the expectations of each.

Yet despite these mandatory formal processes, the core business of doing good advocacy on behalf of people with disability may never really be addressed.

Although all CAGQ advocacy organisations have agreed with the principles of social advocacy, there is still a lack of clarity about what these mean in relation to the evaluation of our work and of our stewardship of the knowledge and development of a strong statewide advocacy movement as a whole. As a sector we have not developed, shared and owned a common position of what we need to be demonstrating and evaluating in order to do good social advocacy, which not only fulfils the general requirements of funding bodies' standards, but also highlights the need for continuous improvement as part of our ongoing mission to do good advocacy on behalf of people with disability.

Because of the continuing lack of clarity and shared ownership by the stakeholders involved in the practice, governance and funding of advocacy, the Advocacy Development Network (ADN) took up the impetus and commitment of CAGQ in a bid to work towards developing a shared vision and practice of what might be involved in principled and coherent evaluation, including regular external evaluation of advocacy groups in Queensland.

Measuring influence is difficult

The core business of doing good advocacy on behalf of people with disability not being addressed by funding bodies' assessments

4. Driving The Agenda Forward

Developing, sharing and owning what we should be evaluating

An Advocacy Development Network Project to build principled, coherent evaluation

**The first phase –
An interactive discussion
paper to identify what it
takes to do good advocacy**

Terms of reference

By committing time, energy and resources to the first stage of the project, ADN was aiming to produce a discussion paper developed with, for and by people involved in advocacy, with opportunity to think about issues and to provide feedback to one another.

The terms of reference for the development of the discussion paper include:

- Identifying different evaluation approaches applicable to social advocacy
- Analysing the applicability of different approaches with different forms of advocacy
- Identifying key inclusions for all advocacy forms
- Defining a set of principles to guide independent external evaluation
- Writing a paper to form the basis for discussion by members of CAGQ
- Making recommendations on possible future directions.

**Feedback from CAGQ
members**

On the basis of these terms of reference, an interactive discussion paper was produced and distributed to all member organisations of CAGQ. The paper posed ideas, dilemmas and options in a bid to identify what it takes to do good advocacy that is governed and managed in appropriate ways. People involved in CAGQ were encouraged to reflect on whether or not the intent of the different sections of the paper were appropriate and to suggest any changes that needed to be made. A discussion session was also held at the statewide CAGQ meeting.

**Changes from member
feedback**

Following feedback from members, this final document has been produced. The main difference in this version is that the higher order principles of social advocacy have been clearly separated from the elements of how advocacy works in practice.

An enabler, not a recipe

This final document hopefully will enable members of CAGQ, as well as new advocacy groups, to consider the implications of the content for planning and evaluation processes in relation to their own organisation. It is important to note that the aim of this project was not to produce a recipe of what needs to be done, but rather to enable organisations to think through processes that will help them to decide what they might be looking for and how they might consider an evaluation of their own work in a principled and coherent way.

For any organisation it is important for its key players to look at what they are doing. This not only informs about organisational life and practices, but also helps to develop and safeguard quality service or in this instance, advocacy. People usually want to know whether or not they are on track, if they are efficient, effective and accountable, how well they are managed, or whether or not they have made a positive difference by being there. Depending on the purpose of the evaluation and who wants it to happen, different components will take on higher importance than others.

Although values should drive work, the traditional concerns for evaluation in human service have usually been mostly around:

- The outputs:** the obvious things that have been done
- The outcomes:** the achievement and effect the work has on the participants
- The process:** the way that the work is developed and undertaken
- The impact:** the unintentional or long-term effects of the work.

As mentioned earlier, because advocacy depends on influence, measuring the outcomes for individuals and groups is very difficult and often invalid. Positive outcomes rely on good will, common sense and the social justice of others who hold power over certain aspects of the lives of people with disability who are vulnerable. As they are often intertwined within a very complex system that can act collectively against the person achieving a decent life, tracing sources of influence to assess the impact of an advocacy effort is rarely feasible.

A framework is required, built upon shared understanding, against which our advocacy efforts can be measured with some sense of certainty or comparison. Such a framework can provide direction, coherence, functions and structures to enable the implementation of the values and beliefs that advocacy organisations hold dearly. Therefore any evaluation of advocacy would imply appraisal against an agreed set of principles and guidelines that express the ideals and priorities of advocacy efforts.

In spite of any conceptual and measuring difficulties, an evaluation is usually built around determining how well people are doing in their work. People involved in social advocacy might want to ask a range of questions about what we do and how well we do it, especially relating to whether or not the underpinning values of advocacy are being upheld.

5. Why Evaluate Our Advocacy?

Informing about organisational life and practices, and safeguarding our advocacy

Traditional processes of evaluation

In advocacy, the values, contribution and process are most important

A framework of shared understanding to evaluate our work against

Need to know how well we are doing our advocacy

Some general questions of importance

Continuous improvement – not just about how well we are doing, but how we can imagine and do better

For example some typical questions that people involved in advocacy might want to ask could be:

- *Are we actually doing advocacy and not something else that is also assisting people?*
- *How do we know if it is good advocacy?*
- *How well are we doing what we say we are supposed to be doing?*
- *How well do we know about and analyse vulnerable people's situations?*
- *How well do we strategise and maximise our advocacy efforts?*
- *How well do we act on behalf of vulnerable people with disability?*
- *How well do we contribute to social justice and the wellbeing of people with disability?*
- *How well is our organisation governed?*
- *How well are we managing our resources?*
- *How well are we developing our sustainability and leadership over time?*
- *How do we continue to stay grounded in the lives of people with disability?*
- *How do we know if we are really making a difference or are causing further unintentional harm to people with disability who are already very vulnerable?*

Although questions about how well we are doing advocacy are important, if we ask them in isolation, or as part of a test, then the process of evaluation is in danger of remaining a static, congratulatory procedure, or an unrelated spasmodic event that causes a bit of navel gazing but usually with some degree of fear and tension.

However when evaluation is seen as part of an ongoing process of development, reflection, discussion and debate about the coherency of values and practices of an organisation, the focus becomes one of continuous improvement. A culture of evaluation is stimulated which is seen as exciting and challenging, rather than as a self-admiring or a defensive exercise.

It is important for organisations to move from the notion of evaluation being an event to embracing evaluation as an ongoing process integrated into the daily life of an organisation. This requires the development of non-defensive relationships that encourage and allow for challenge and debate of all those involved, with recognition of the different investments of each of the participants. (Hallahan, 1996)

Building a culture of evaluation is usually shaped around a process of action learning, which is defined as *a continuous process of learning and reflection, supported by colleagues, with the intention of getting things done.* (McGill and Beaty, 1995) So rather than action being the key focus of the work, it becomes a key part in a learning cycle of planning, action, observation and reflection. This process needs to be owned by all players in the organisation and be seen as a valuable part of organisational life and of safeguarding what the organisation stands for and the quality of the work it does.

Other people will tend to judge us by how they see us behave, rather than by what we say we know or believe. Strengthening the need for an organisational culture of evaluation are the theories that pose reasons for the sometimes-vast differences between our beliefs and our actions. These theories assume that even though we may know or believe certain things about life, our actions may not always match the knowledge and beliefs. In other words, there can be a gap between our beliefs and our actions. (CRU, 2002)

Recognition of the gap

*Feelings of discomfort
 Heightened stress levels
 Is reduced by change of behaviour or by change of belief.*

Festinger, 1957
 Cognitive dissonance

Non-recognition of the gap

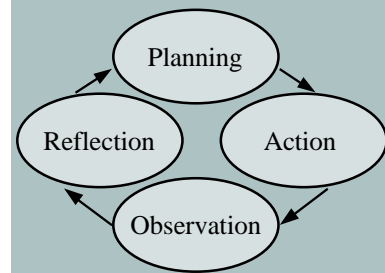
*Others see it but find it difficult to bring our attention to it
 Needs a process to draw it to our notice.*

Dalmau and Dick, 1990
 Espoused theory versus theory in action

Regardless of whether we see our inconsistencies and try to alter our behaviour or our beliefs to reduce the stress, or whether we are blind to the inconsistencies and plough on despite the consequences, these theories can inform our work and our relationships and strengthen the need, not only for continuous reflective internal evaluation, but also for regular external evaluation.

6. Building A Culture Of Evaluation

Action learning



Differences between what we believe and what we do



Strengthening the need for evaluation

7. Why evaluate externally?

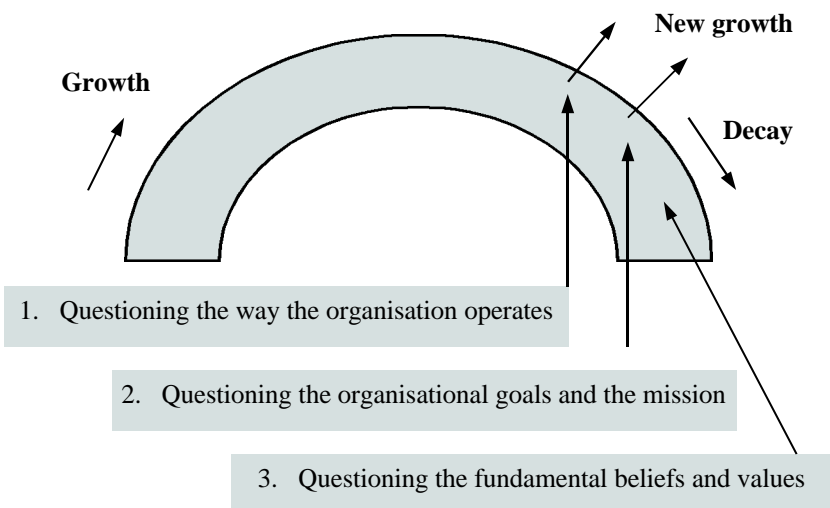
Avoiding organisational decay

Are we coherent? Are we rational?

Avoiding the sameness of an internal group think

The coherency between the beliefs, values, mission or goals and the way an organisation goes about its practice are of key importance to the work that is done and the well being of the organisation as a whole. These not only need to be agreed on as part of any establishment phase, but also need to be addressed over time.

Any organisation will have periods of growth and development, and periods of decay. The decay phases, in the early stages, usually relate to **the way the organisation operates**. However if operational issues are not recognised and addressed, the **mission and goals** will then come into question. In turn, if these are not addressed, the **fundamental beliefs and values** of the organisation will be doubted, causing its eventual disintegration. (Dalmau and Dick, 1985)



Attempts can be made internally to deal with perceived lack of coherency, but when the gap is not recognised then formal processes of external evaluation need to be in place as a safeguard to ensure that others can highlight for us any inconsistencies between:

- *The roles and functions of the organisation.*
- *The direction and purpose of the organisation*
- *The moral and ethical reasons for the organisation's existence.*

Another reason for having regular external evaluations is to avoid any group think mentality so that like-minded people don't get carried away with their own power, thoughts and ideas and lose the reality of the situation. This can easily happen when people only talk with others who are inward looking, relying on their own understanding and expertise.

Having people with understanding of the circumstances, but who are independent of the organisation and not intimately tied up in its workings, can bring into focus unrecognised gaps and inconsistencies.

If, collectively, the framework that articulates the moral and ethical reasons for advocacy's existence is not clear, then the direction and purpose of organisations doing advocacy will also not be clear. Organisations will not be functioning in ways that deal with the harm that is done to individuals or groups of people with disability, not only by perpetrators, but also unintentionally by well meaning people, perhaps including themselves.

In the long run evaluation develops and safeguards the practice of advocacy, not only that being done by any one organisation, but also for all, across the whole advocacy sector.

Because social advocacy does challenge systemic and widely held views about disadvantaged and vulnerable people and tries to address fundamental needs, well being and social justice on their behalf, it is essential for those organisations doing formal advocacy to be seen as working in a similar vein and against the same common concerns.

If some groups just tinker around the edges attempting to do some good by fixing up the easy little things, yet without a sense of the real difficulties in people's lives and of the need for focussed purpose and urgency, then situations never change and advocacy as a whole is weakened.

Any external evaluation therefore needs to be asking the hard, ethically challenging questions to try to identify the coherency between beliefs and practices to ensure that organisations are operating with decency, honesty, integrity and honour. It would also be concerned about minimising or balancing competing agendas so that the real purpose of advocacy is achieved.

The following sections of this document give some ideas as to how a framework for advocacy evaluation can be developed by people involved in formal advocacy organisations who work on behalf of vulnerable people with disability in Queensland.

Outsiders can bring focus

The need for a clear framework for advocacy organisations

Evaluation safeguards the practice of advocacy

Doing the daunting things, not just fixing the easy bits

Asking the hard questions – being ethically challenging

SECTION 2 PRINCIPLED ACTION

1. The definition of social advocacy

The practice of advocacy should reflect the inherent meaning of the components of this definition

Advocacy is speaking out, acting or writing with a minimal conflict of interest on behalf of the sincerely perceived interests of a disadvantaged person or group to promote, protect and defend their welfare and justice by being on their side and no-one else's, being primarily concerned with their fundamental needs, remaining loyal and accountable to them in a way which is emphatic and vigorous and which is, or is likely to be, costly to the advocate or advocacy group.

In spite of the fact that we are a diverse group of organisations doing advocacy, and that evaluation of our work is difficult, different and not well articulated, we do share a common base and a body of knowledge that has been growing, not only here in Queensland, but also nationally and internationally. The current member organisations of CAGQ have already committed to general values and a definition of social advocacy, which embodies a series of principles and elements upon which the advocacy is based, in the belief that when advocacy actions and efforts reflect the intent of the definition, advocacy can be more effectively evaluated and the interests and well being of people with disability are more likely to be served. (CAGQ, 2002) So what are these shared commitments and what do they really mean behind the rhetoric of mere statement?

2. Overarching Principles of Social Advocacy

The principle of fundamental human rights

People involved with advocacy organisations believe that people with disability have the same human rights as others. This means that there is recognition of the inherent dignity, and of the equal and inalienable rights of all members of the human family, forming the foundation of freedom, justice and peace in the world.

There is also recognition that disregard and contempt for human rights have resulted in barbarous acts which have outraged the conscience of humankind. As these despicable acts happen regularly in the lives of people with disability, people in advocacy believe that these acts need to be brought to wider attention as they continue to work against a world in which all human beings can enjoy freedom of speech and belief, and freedom from fear and want. These aspects have been proclaimed as the highest aspirations of all people and should be protected by the rule of law. (United Nations, 1948)

Key Tenets of the United Nations Declaration of Human Rights

- *All human beings are born free and equal in dignity and rights.*
- *Everyone has the right to life, liberty and security of person.*
- *No one shall be held in slavery or servitude.*
- *No one shall be subjected to torture or to cruel, inhuman or degrading treatment or punishment.*
- *Everyone has the right to recognition everywhere as a person before the law and are entitled without any discrimination to equal protection of the law.*
- *No one shall be subjected to arbitrary interference with privacy, family, home or correspondence, nor to attacks upon honour and reputation.*
- *Everyone has the right to freedom of movement and residence.*
- *Men and women of full age have the right to marry and to found a family.*
- *The family is the natural and fundamental group unit of society and is entitled to protection by society and the State.*
- *Everyone has the right to own property.*
- *Everyone has the right to freedom of thought, conscience and religion.*
- *Everyone has the right of equal access to public service.*
- *Everyone has the right to social security and is entitled to realization of the economic, social and cultural rights indispensable for dignity and the free development of personality.*
- *Everyone has the right to work and the right to equal pay for equal work.*
- *Everyone has the right to a standard of living adequate for the health and well-being of self and of family, including food, clothing, housing and medical care and necessary social services.*
- *Everyone has the right to education.*
- *Parents have a prior right to choose the kind of education that shall be given to their children.*
- *Everyone has the right freely to participate in the cultural life of the community, to enjoy the arts and to share in scientific advancement and its benefits.*
- *Everyone has duties to the community.*

Advocacy organisations need to be promoting, protecting and defending the lives and the fundamental human rights of people with disability

People with disability have the same human rights as others

The principle of social justice

**Equity
Access
Participation
Equality**

The principle of inclusion in community life

A belief about where people with disability belong and how they are to be treated

This means that advocacy organisations need to be on the look out for and doing something about violations of the fundamental human rights of people with disability.

The principle of social justice embrace the acknowledgment of equity, access, participation and equality, and involve:

- *Not only having the same basic human rights as other members of society, but also having the power to exercise those rights*
- *Recognising the need to redress the balance of power, so that a fair distribution of economic resources and political power give a level playing field in comparison with other citizens*
- *Having fair and equal access to quality goods and services in areas essential to achieving and maintaining a decent lifestyle*
- *Participating and contributing in personal decision making and in wider social, economic and political life*
- *Having equal opportunity and the capacity to live without discrimination and achieve according to potential.*

Advocacy organisations are therefore promoting the notion of a civil society and active citizenship of people with disability.

People involved in advocacy also believe that people with disability are part of the makeup of the wide diversity of our communities. They therefore are to be included and supported to participate and contribute to the rich fabric of family, neighbourhood and community life and be treated in a fair manner with respect for cultural and other differences.

This means that advocacy organisations need to be promoting diversity as a socially valued construct, with the systemic removal, congregation or segregation of people on the basis of their disability being strongly questioned. People involved in advocacy therefore are participants in the continued quest to find ways that enable people with disability not only to be in community but also to be valued participants and contributors in the usual roles and relationships of everyday life.

Although a generalised statement about what is involved in advocacy has been accepted (CAGQ, 2002), its elements have not been put in ways that translate their meaning into practice. The following section gives opportunity to consider the elements in a more spelt out form and gives individuals and organisations a chance to think about what they mean in relation to their advocacy efforts. If we can clarify the meaning of these elements in practice, we then can move on to the next phase and consider how we can use them to evaluate our work.

Taking positive, ethical action means doing something constructive in an attempt to better the situation for a person/people with disability by some form of overt action such as speaking out, writing or raising issues of concern. However this action does not happen in a moral vacuum. The action happens in the context of the overriding principles of fundamental human rights, social justice and inclusive living. These guide the decisions of the advocate in concert with each element of advocacy.

By adhering to these principles the organisation or its advocates will not support harmful things that will affect the person's/people's safety or capacity to live in the community, or for things that lead to their being more at risk, or isolated, or in trouble with the law. Therefore much consideration goes into what action is to be taken on the person's/people's behalf.

Often the action is contrary to the usual systems of operating and it is done because of a strong belief that what is happening is unfair or not right. The action is taken on behalf of others because there is recognition of the lack of voice and value attributed to the person/people and therefore they are credited with little authority and have little power to change their situation alone. The action is taken because the person/people are seen to be very vulnerable, at risk of harm, in real danger, or in a helpless situation to address what needs to happen in their lives.

Being on the side of someone who is vulnerable means being clearly biased in favour of that person/people with disability and articulating their needs and interests, remaining on their side and no one else's. There is recognition of the inherent positive value and authority of the person/people, acknowledging their worth and treating them with respect and dignity. The focus of the advocacy effort is on promoting, protecting and defending their very being and personhood, emphasising their worth, their humanness, their wellbeing and their human rights. Advocacy organisations and advocates model positive language, interactions, interpretations and imagery of, and with, people with disability..

3. The elements of advocacy

Advocacy involves taking positive, ethical action on behalf of a person/people with disability.

Advocacy is clearly on the side of the disadvantaged or vulnerable person/people with disability

Advocacy is understanding of the position of a person/ people with disability and of their real and potential vulnerability

Advocacy strives to be autonomous and independent of other systems that can cause conflicts of interest

Advocacy focuses on the fundamental needs, welfare and interests of people with disability

Being understanding of the position and vulnerability of a person/ people means that those involved in an advocacy effort need to have good grounded knowledge of the struggles of people with disability. They need to understand the impact of their impairments and the social devaluation that they can face, including the loss of relationships and valued roles, rejection, poverty, segregation, isolation, abuse, neglect, discrimination, exploitation and loss of control of life.

Advocacy groups need to be well informed about the wider context of policy and law and how these affect life, and be mindful of the limitations of formal service systems to meet all human needs, including the threat of increased vulnerability when people become captives of institutional or controlling systems. The advocacy effort is clearly done with the understanding that advocacy, if not well considered, can also do more harm or increase a person's/people's vulnerability by their presence or actions. Those involved are also mindful of their impact on the situations of others who could also be made more vulnerable by their presence or actions.

Being independent with minimised conflicts of interest means that board members, paid staff and other committed people involved in advocacy make concerted efforts to minimise ways that the work of individuals or the organisation can be compromised. To this end, advocacy needs to remain apolitical, as well as independent and distinct from service delivery.

People need to identify and deal not only with real, but also with perceived conflicts of interest caused by having other roles and allegiances. These can, and do, affect organisational decision making and advocacy efforts if not addressed. Advocates also need to identify factors that might compromise their own efforts by examining their attitudes, values, needs and relationships to minimise personal conflicts of interest.

Focussing on the fundamental needs, welfare and interests means that the person/people and their situation are deeply known so judgements about their wellbeing and circumstances can be made with full knowledge of their circumstances. Knowing the reality of their life/lives enables prioritising of their needs, and sincerely perceived interests, particularly those relating to their human rights. An advocacy effort is designed, having the potential to minimise harm and vulnerability, and change the negative nature of life. People involved in an advocacy effort constantly weigh up moral dilemmas regarding decision-making, leading to any action on behalf of the person/people being very considered and strategic. Such a task is difficult and fraught with many pitfalls.

Consideration needs to be given to what it would take to act in the person's/people's **best interest**, and then doing so in good faith, usually within the context of an established relationship. Decisions are not taken lightly and are followed through as to their intended and unintended consequences. By holding a vision for a decent life and addressing fundamental needs of safety, health or a home, real life issues are tackled that will make a significant difference to the person's/people's welfare.

In general terms, advocates also need to be clear about what they are asking for, what they are prepared to compromise and what becomes a sell out that they will not accept on behalf of the person/people.

Doing advocacy with vigour and a sense of urgency means acting with passion and strength, and setting time frames that show the importance of making positive and fundamental change. This does not mean being rude or inhospitable to others or going in with unrealistic demands. However it is about doing much more than what is done routinely. Because of the nature of the action it is often done with a sense of urgency, indicating the importance of what needs to happen for the person/people in the scheme of things.

Remaining loyal and accountable to the person/people with disability means being there for the long haul and being faithful over time when things get tough, or possibly even tougher. For some people with disability, life is a constant struggle and for others it throws up a series of situations where strong advocacy is needed episodically as issues keep reappearing whereby the person/people may become very vulnerable again.

People doing advocacy often remain the anchor in the person's/people's life, knowing them well, knowing their history and being there when they are needed. This is particularly so when people are isolated or only have paid staff in their lives and no other people who are prepared to take on this role. People doing advocacy also need to be around to share the good times and to be part of the ordinary celebrations of life, as well as to rejoice in the victories and positive changes together with the person/people with whom they have an advocacy based relationship.

Acknowledging the costly nature of advocacy means being realistic about the negative consequences for the advocate or advocacy group, because strong advocacy efforts are usually working against the status quo by challenging circumstances, vested interests and conduct of others in relation to the life and vulnerability of a person/people with disability.

Advocacy is done vigorously with a sense of urgency indicating its importance in the scheme of things.

Advocacy remains loyal and accountable to the person/people over time.

Advocacy is costly or likely to be costly to the advocate or the advocacy group.

Costs**Advocacy groups have clarity of purpose and remain focussed on their particular advocacy mandate***The Advocacy Filter*

- *For whom*
- *By whom*
- *For what*
- *Against what*
- *How done*

The content and implications of this important filter are discussed later in the document.

Clarity of staff role: Recruitment and support, or supporting others, or doing the advocacy?

Costs typically include personal detriment such as amount of time and effort spent, the emotional rigor, or the sacrifice of rest, sleep, recreation, money, personal relationships or health. Broader costs include incurring resentment and hostility of others, being rejected and labelled by peers, losing earning capability etc. At the more extreme end of social advocacy there could be risk of violence, hurt, and losses which effect livelihood and life. As advocacy is not usually played out in the mainstream, advocates need to be prepared to cope with these personal and broader social costs when they take on these widely sanctioned systems.

Having clarity of purpose means that advocacy groups are clear about the work they do and how they do it. Different forms of advocacy necessitate different methods of going about the work and each form will have particular emphasises depending upon whether they are systemic, individual or citizen advocacy. Particular advocacy strategies are usually planned in the context of the advocacy filter and are carried out strategically, with defined expectations for self and others, depending upon the advocacy type.

The **different forms of advocacy** tend to be kept separate because of their antagonistic functions that constantly pull upon each other, causing weakening of each form and adding to the lack of clarity of purpose when combined. Single function advocacy organisations can be clearer about their advocacy filter and ensure that there is coherence between what they say they do and what they actually do in practice.

By having **clarity of the advocacy filter**, an advocacy agency can go about its work in ways that ensure they are working with a range of people who need advocacy and also being clear about who is doing the advocacy and in what ways. This is particularly important regarding the roles of paid staff, firstly in relation to whether the advocacy is on behalf of an individual or a group and secondly as to whether they are either putting their efforts into recruitment of people to do the advocacy, or are supporting others to do advocacy, or are doing the advocacy themselves.

In practice this principle also means that advocacy is **not just another form of service provision or another interest or lobby group** about a particular issue of concern. Advocacy organisations can easily become incoherent without vigilance and clarity when they jump in to try to fix things because others are not doing their job well. Because things do need to happen for people, the great temptation can be to try to do it all themselves rather than to try to influence those with the responsibility and mandate to do it.

This trap is easily entered into when organisations take on the roles of service provider, support worker, case manager, coordinator, change agent, community development worker, information and referral agency, or representative peak body because there is a need for these things to happen. Yet advocacy efforts are severely weakened with little real advocacy being done as a result.

Confusion also reigns about the difference between advocacy and complaints, mediation or arbitration mechanisms fuelling further incoherency, with expectations, especially by governments, that advocacy organisations will wield a big stick to clean up other people’s acts on their behalf. The role of advocacy is **not that of big brother to watch over services** to make sure they are doing the right thing. Although advocates may take on this role from time to time in the context of their relationship with a person or group, the focus still remains on the person/people and their fundamental needs, not on the service.

The formal system of protection through government is also different from independent social advocacy and should not be seen as similar to it or as a replacement for it. The Adult Guardian, Community Visitors, the Ombudsman and the Public Advocate all have different protection roles and functions, and have a mandate to raise issues, but are still housed within the current system of government, being party to the bureaucratic and political climate of the times. Social advocacy’s strength is that it is embedded in the life of community and is not working to government or service system agendas, although it will at times react to them.

In the context of having a well rounded diversity of different agencies, all the following mechanisms are of importance. **However just as support, protection services and advocacy need to be separated, so do the different forms of individual and systemic advocacy.**

Not doing other good things like providing or coordinating services

Not complaints or mediation

Allegiance to the person with disability or group not to services or systems of government

Nature	Support Services	Protective Services	Social Advocacy
Individual Need	Service provider, direct support worker, case manager, coordinator, change agent, therapist, community worker, information and referral agency	Complaints services Adult Guardian Community Visitor Ombudsman Anti-Discrimination Commission Mediation services	Citizen advocacy Individual advocacy
Collective Need	Representative peak body, lobby group	Public Advocate	Systems advocacy

Not being all things to all people

Advocacy groups have robust processes for stewardship, governance and management.

Active recruitment and ethical leadership development

Commitment to people with disability should remain at the heart of the organisation's work and relationships.

If care is not taken, advocacy organisations can mistakenly try to become all things to all people, acting no differently from any incoherent service trying to support people, or becoming a jumbled group lobbying for change around reactive superficial aspects of people's lives. As so few resources are assigned to advocacy, it is very important that resources are used well and not frittered away on superficialities, or on providing other things, which are in fact good things, but are the role of others and not of advocacy agencies.

Robust processes for stewardship, governance and management were not included in the original CAGQ list, but this one has been added, as it is a cornerstone of any good organisation. Its omission was possibly because of the heavy focus already on this area in the government funding bodies' disability service standards. However it can also be assumed that advocacy groups should have robust processes for stewardship, governance and management, helping people to stay clear about the mission, principles and goals of the organisation.

A key role of a governing body or management committee is stewardship which can be demonstrated by embracing the history of the organisation and by nurturing its development and well being into the future. In practice this means supporting an advocacy development processes that encourage active recruitment and ethical leadership development of core people from the local community who hold good values about people with disability and their rightful place in community life and who have concern about the perpetration of injustices.

Processes which assist with the understanding of advocacy and **staying clear** about the principles, elements, goals and priorities of the advocacy efforts would be evident and these would form the basis of policy development in the context of understanding the history and culture of the organisation.

This element also assumes good practical processes for managing the organisation and its resources. This would be evidenced by:

- good selection and deployment of staff
- sound principled policy development
- good quality planning
- clear implementation strategies
- good human relations practices
- transparent, accountable use of resources.

Opportunities for sharing and reflecting on and evaluating the values, intentions, processes and advocacy efforts should also be apparent.

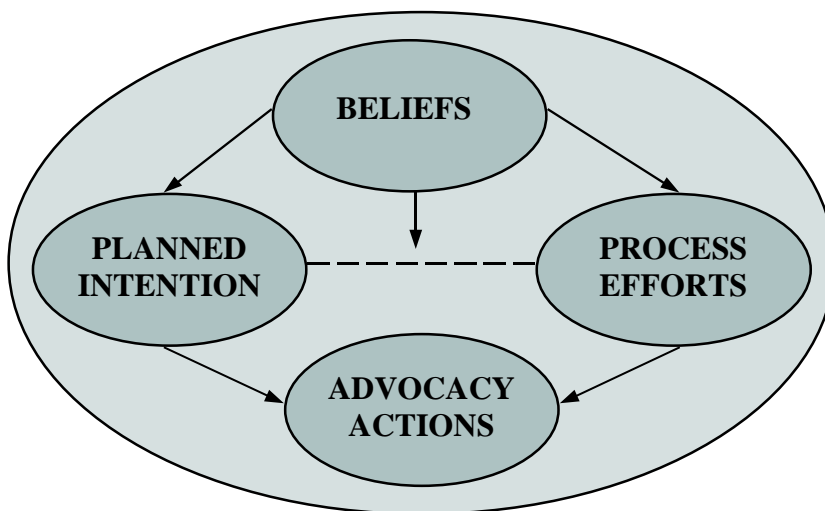
SECTION 3 PLANNING CONSIDERATIONS

Each of the principles and elements of advocacy establishes expectations about how an agency will operate and raises a number of questions which can be posed to consider whether or not the agency is on track with their work, and whether they have coherency between what they say they do and what they actually do.

Already we have the **CAPE guidelines**, which set forth clear expectations about how a Citizen Advocacy program can be evaluated using citizen advocacy principles. (O'Brien and Wolfensberger, 1981 and O'Brien, 1987) Although each form of advocacy will operate differently and have their own peculiarities in relation to a formal evaluation, they still share many commonalities based on the principles and elements.

Some general considerations about planning are discussed in relation to an external evaluation in this section, followed in the next section by a series of strategic questions that will help to clarify how advocacy principles, elements and other fundamentals of running a good organisation can be used to consider the quality of organisational practice.

As described before, in any evaluation clear distinctions should be made between what people associated with the advocacy organisation believe, what they plan to do, what efforts they take to find solutions and what they actually do. Evaluation questions need to be considered therefore in a range of such contexts, however, emphasis needs to focus on what is done in practice.



Done in the context of reflective practices

1. Evaluating The Principles And Elements In Practice

CAPE Guidelines help to set the way

**What is believed
What is planned
What efforts to find solutions
What is done**

Evaluation questions seeking evidence of general advocacy principles and elements

<i>How are the principles and elements demonstrated in what is said about the values and beliefs of the organisation?</i>	<i>How are the principles and elements demonstrated in policies and what is intentionally planned for?</i>	<i>How are the principles and elements demonstrated in efforts to find appropriate processes and solutions?</i>	<i>How are the principles and elements demonstrated in what is done with and on behalf of the person/people and the effect it has?</i>	<i>How are the principles and elements demonstrated in reflective evaluation processes of the organisation?</i>
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It could be expected that these areas are important for any advocacy organisation's evaluation. A set of evaluation questions therefore would seek the following evidence in relation to the principles and elements of advocacy:

In this way a formal evaluation can establish if the organisation is operating in a **principled** way, that is **having guiding rules for right behaviour of method or practice** and being ethical, upright, just, moral, and honourable. It also will help to determine whether or not the agency is operating **coherently**, that is **having natural well-reasoned connection of parts** and being logical, rational, sound, consistent, articulate and lucid in the way it goes about its work.

2. Composition Of An Evaluation Team

Not exploitative or damaging – giving constructive feedback

Members of any team doing an external evaluation need to be chosen because they have some understanding of evaluation processes as well as understanding of what promotion, protection and defence of socially disadvantaged and vulnerable people are about, in the context of social advocacy. Contact with people involved with the advocacy organisation should not be exploitative or damaging, the aim being to gain information and give constructive feedback.

As the process of an external evaluation is to make sense of what is happening, it seems sensible to have a number of people involved in an evaluation team. Such involvement can be considered part of the team member's own advocacy development as well, as, by considering an organisation's strengths and weaknesses in such depth, it enables refining of ones own ideas about advocacy and organisational life, and the building of greater skill and know-how in the sector.

The team leader

An evaluation team needs a leader with good analytical skills, who is familiar with advocacy evaluation and with processes that enable a group to come to agreement about the key aspects for feedback. The team leader should have minimal conflicts of interest and be sensitive, as they have the responsibility to organise and convey the team's findings constructively to the organisation personally and in a written report.

An evaluation team is usually 4 people, as an even number enables gathering of information in pairs and a newer member to link with a more experienced one. This means that at least half the team should have some experience in evaluation. It may be important to have a balance of some factors including gender and background and to consider the different experiences and perspectives of team members that will complement one another. Conflicts of interest should also be considered including the implications of using only paid staff from other very closely linked advocacy organisations from the same State.

An external evaluation may take up to a week, providing opportunities for team members to meet with a range of people involved in the governance and work of the agency and those who are touched by the work of the organisation. Time is also needed to reflect on and debate the organisation's adherence to its advocacy foundations.

Different people will hold different keyholes of knowledge and experience of the organisation. Each perspective holds some relevance to any formal evaluation, building up to provide a picture of the organisation and its work. It is therefore important to gain a broad understanding of the processes and contributions of a range of people who have been involved or been touched by the organisation in some way. People's information will also hold different weightings in the analysis, given the nature of their involvement.

The following perspectives could be sought:

- *members of the governing body (board or management committee members)*
- *members of a core group (key active members, advisors, mentors)*
- *paid staff of the organisation (coordinators, advocates, administrators, resource workers)*
- *people doing advocacy (paid or unpaid advocates)*
- *people advocated for (people with disability in advocacy relationships supported by the agency, or whose voice is put forth on their behalf by the agency)*
- *people in alliance with the agency (whistle-blowers, other advocacy organisations, coalition members and other allies, network connections, social justice or legal groups).*

The evaluation team

Reflection and debate about the adherence to advocacy foundations

3. Building A Picture From Keyholes Of Experience

A look at the organisation from a range of perspectives

Different connections depending on the advocacy type

Different types of advocacy groups will have people with connections from each of these groups. Others who may also have windows into the organisation who might be of benefit to many advocacy groups could be:

- *other people with disability*
- *family members of people with disability*
- *workers who are behind the scenes and positively involved*
- *financial members of the organisation*
- *funding body representatives.*

4. Goals Of An External Evaluation

The following general goals could be considered by all advocacy organisations:

- *To convey and analyse contributions to the social justice and welfare of people with disability for and with whom the agency works*
- *To give focus to the advocacy foundations in the life and work of the organisation*
- *To refine, develop and share advocacy understanding and practice*
- *To identify existing and emerging problems with the organisation's practice*
- *To refine and develop the structure and processes of the organisation and its work*
- *To determine coherency as an advocacy organisation.*

Getting to the nub of the life and work of the organisation

An evaluation that seeks to work towards these goals should get to the nub of the life and work of the organisation, yielding useful information, insights and opportunities to build on its strengths and to target areas that require development and safeguarding. Other more specific goals could be added with relevance to the specific advocacy type and the needs of the particular organisation.

Six ethical considerations have been put forward to guide the external evaluation process: (Hallahan, 1996, SUFY, 1998)

- *Do no harm to the people advocated for*
- *Protect confidentiality of all parties*
- *Give no promises that won't be kept*
- *Avoid intrusive or unnecessary questioning*
- *Give considered and constructive feedback*
- *Use no information for other purposes without consent.*

As good external evaluation processes don't happen without considerable planning, a formal strategy needs to be developed to ensure that all aspects come together at the right time and place. These are some suggestions that have been put forward to help to organise an external evaluation process.

a) Ensure a workable **budget**

- *A set amount of money might be put away each year, or a special grant or top up might be sought from the funding body or another source for the evaluation*
- *Plan at least a year ahead and consider how this will affect organisational priorities*
- *Consider the following in a budget:*
 - * *travel, and accommodation costs for the evaluation team*
 - * *meal allowances*
 - * *local transport and mileage costs*
 - * *payment of the team leader*
 - * *payment to team members who may be out of pocket by their involvement*
 - * *extra administrative costs*
 - * *other possibilities such as access to a room for meetings or for team deliberations.*

5. Code Of Ethics

Doing the right thing by people

6. Developing The External Evaluation Process

A budget

An evaluation subcommittee

b) Establish a small **evaluation subcommittee** made up of staff, committee members and key others who discuss the process and are responsible for setting it in motion:

- *Why an evaluation is important for the organisation*
- *What is known about external evaluation of advocacy organisations*
- *What the organisation would evaluate*
- *What process the organisation will use*
- *A time line for the process highlighting important tasks and milestones*
- *Criteria for selection of the members of the evaluation team*
- *Invitations to prospective team members*
- *A short paper about the organisation's thoughts and issues to guide the team*
- *Other pre-reading that would be helpful to the team*
- *Names of possible people to be contacted for interview*
- *A schedule of arranged contacts for the team.*

SECTION 4 STRATEGIC QUESTIONS

1. Categories For Consideration

In the Citizen Advocacy Program Evaluation (CAPE) consideration is given to 3 key areas:

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

These statements provide a useful starting point and can be readily interpreted to develop a series of questions that could be considered in the development and evaluation of general advocacy practice, regardless of the form.

These strategic questions are designed to stimulate thinking about these three areas:

Advocacy principles and elements

Office contribution and effectiveness

Organisational continuity and stability.

They are not definitive or limited, but merely act as a guide for further thought about important issues relating to the work and efforts of advocacy organisations.

The following strategic questions try to get to the nub of how the overriding advocacy principles might be put into practice by raising important areas for consideration.

- How does the organisation describe what it does in relation to higher order human rights as opposed to lower order societal expectations such as individual choice?
- What evidence is there of tackling some of the hard human rights issues on behalf of a person/people with disability, for example:
 - * addressing sanctity of life issues ?
 - * protecting and safeguarding against harm or degrading treatment?
 - * maintaining the essential dignity of the person/people in everyday life?
 - * ensuring an adequate standard of living—food, clothing, housing, medical care, social services?
 - * ensuring basic education?
 - * ensuring equal protection under the law?
- How does the organisation describe social justice?
- In what ways does the organisation demonstrate on behalf of a person/people with disability:
 - * equity, by increasing the power of the person/people to exercise their basic human rights, to gain the ear of political power and to have a fair distribution of economic and other resources?
 - * access, by ensuring the person's/people's equal access to goods and services, including public services, essential for a decent lifestyle?
 - * participation and contribution in personal decision making, and where there is limited capacity, ensuring protection or working on behalf of the person/people in their best interest?
 - * equality of opportunity, ensuring the person/people live without discrimination and are able to achieve in life?
- With what other allies, interested in social justice or community regeneration, are the organisation or the advocates aligned?

2. Adherence To Advocacy Principles

Human Rights

Social Justice

Inclusion in Community

3. Adherence To Advocacy Elements

About clarity of purpose and remaining focussed on the particular advocacy mandate

For Whom?

By Whom?

- How does the organisation promote the diversity of communities and the inclusion of a person/people with disability in everyday life?
- How are the systematic removal, congregation, segregation or isolation of a person/people with disability questioned by the organisation?
- In what ways does the organisation influence better ways of including a person/people with disability in the everyday life of home, family, neighbourhood and community?

The following strategic questions try to get to the nub of how the overriding advocacy principles might be put into practice by raising important areas for consideration.

- **How does the organisation describe their advocacy filter?**
- **Who are the people for whom the advocacy is done?**
 - * How are vulnerable people with disability found/identified?
 - * How is diversity demonstrated in the range of people, ages, abilities, support needs, challenges, responsiveness, living arrangements and other life circumstances?
 - * Is there strong representation of individuals/groups most at risk of isolation and least able to represent and defend their own interests
 - * What area is covered and where are people located?
 - * What are realistic numbers/groupings given the level of resources?
 - * How is ability and inability to advocate for people conveyed?
- **Who are the people who do the advocacy?**
 - * Are advocates in paid roles or in freely given relationships?
 - * How are possible advocates found and recruited?
 - * What qualities are looked for?
 - * How do advocates learn about advocacy and its principles?
 - * How do advocates learn about the role of the organisation?
 - * How are advocates and vulnerable people connected?
 - * How are advocates supported to develop knowledge and practical means of meeting the needs of people with disability?
 - * How are advocates supported in their role?
 - * What opportunities do advocates have to be involved in developing ongoing knowledge of advocacy and its strategies?

- **What is the advocacy for?**

- * How are human rights, social justice and community inclusion obvious in the way the organisation describes what it does?
- * How are efforts focussed into bringing a person/people into family, social and community life?
- * How is harm reduced?
- * How do people share time and experiences?
- * How do people associated with the agency demonstrate actions that lead towards the person/people having a chance of an ordinary life with a range of relationships, roles and life experiences?

- **What is the advocacy against?**

- * How is diversity demonstrated through a range of issues and circumstances such as exclusion, segregation, isolation, abuse, neglect, discrimination, exploitation, stigma, medicalisation of life, homelessness, dehumanised treatment or living conditions?
- * In what ways are advocates prepared to challenge negative human service practices and systems?

- **What form of advocacy is done?**

- * Has the agency one clear identity as an advocacy organisation? (or at the very least a clear separation of function of two antagonistic forms)
- * How clear is the agency about the differences between advocacy, advocacy support and advocacy development?
- * How is the core business evident in agency's work?
- * How is the staff role described?
- * How does the agency operate from a position external to and distinct from the service system?
- * How does the agency avoid or minimise involvement in other worthy things that are not the realm of its stated form of social advocacy?
- * How do policies and procedures clarify the explicit roles of the people involved?
- * How does the agency demonstrate the separation between representing and influencing, and providing what needs to happen in the person's life/people's lives?
- * How do advocates search for solutions that are not only provided by the human service system?
- * What connections does the agency have with other advocacy agencies, especially those of a similar form? Consider staff, governance and core advisory groups
- * How is the wider collective advocacy identity supported by the agency?
- * What reflective practices does the agency use to judge its day-to-day performance?
- * How does the agency learn from its shortcomings?

For what

Against what

How done

About striving to be autonomous and independent of other systems that can cause conflicts of interest

- What connections does the agency have with the service system? Consider administration, physical separation and people
- With whom are the agency and advocates aligned?
- How does the organisation see conflicts of interest in relation to:
 - * Paid/unpaid advocates
 - * The governing board/management committee/core group
 - * Key alliances
- How do people talk about and address their 'wearing different hats'?
- How are any conflicts of interest minimised?
- How does the organisation deal with overt conflicts of interest?
- How does the organisation deal with perceived conflicts of interest?
- What compromises might advocates consider from their wider life context?
- What conflicts of interest does/do the source/s of funding raise? Consider loss of funding, single versus multiple sources, as well as undue deadlines and accountability measures at odds with the agency's work?
- When could advocacy be weakened or compromised?

About being clearly on the side of the disadvantaged or vulnerable person/people with disability

- How is bias towards the person/people shown?
- In what ways do advocates enhance the humanness and positive image of the person/people? Consider language, interactions, involvements
- In what ways does the agency enhance the humanness and positive image of the people? Consider name, language, documents, logo, literature, office location, décor, gatherings, fund raising, media
- How are conflicts about what should happen in an advocacy relationship handled?

About being understanding of the position of a person/people with disability and of their real and potential vulnerability

- How do advocates/the agency describe social devaluation, and loss of valued roles and relationships?
- What is people's understanding of what it means to be vulnerable?
- How are the struggles of a person/people known about and understood?
- What is the advocate's understanding of the systems of support around the person/people and the policies and laws that influence their lives?
- What does the advocate/agency do to minimise further harm to the person/people?

- How do advocates seek knowledge about the person/people which is beyond that readily provided by agencies or families?
 - How do advocates get to know a person/people deeply and understand the reality of their life/lives?
 - How is the person's/people's quality of life reflected upon?
 - How does the advocate identify with the person/people they are advocating for?
 - How are considered judgements made about the situation and what needs to begin to happen?
 - How do advocates work out what is most important?
 - How do advocates work with people with difficulty in making choices? Consider people who cannot speak, people who reject relationships, people who have difficulty forming relationships, people who cannot give informed consent, or groups without a voice
 - How are moral dilemmas surrounding choice and best interest dealt with?
 - How do advocates consider and deal with both intended and unintended consequences of their action?
 - What safeguards are necessary to ensure the best interests of the person are being advocated for?
 - What things are people doing for one another in the advocacy relationship?
-
- What evidence of overt action on behalf of a person/people is apparent?
 - How does the advocate represent the perceived needs of the person to others?
 - What is being promoted, protected and defended?
 - What action has been taken to reduce danger or harm?
 - What steps are taken to remedy unfair, unjust, isolating, neglectful or abusive situations?
 - What action has been taken against to address the legacy of others misusing their power and authority?
 - How is the person's/people's authority increased by the presence of the advocate/s?
 - How does the advocate follow due process?
 - How do advocates represent the best interests of the person in an empowering way, with the person/people having a say and a sense control, or a sense of well being about issues that affect their lives (as opposed to 'empowering' them to do so themselves, especially when they may not be in a position to do so)?
 - How does action mirror the dignity and value of the person as a respected citizen?
 - How do advocates demonstrate integrity?
 - How do people know if advocacy is really making a difference to the person's life/people's lives?

About focusing on the fundamental needs, welfare, interests and human rights of a person/people with disability

About taking positive, ethical action on behalf of a person/people with disability

About working vigorously with a sense of urgency indicating its importance in the scheme of things

About remaining loyal and accountable to the person/people over time

About being costly or likely to be costly to the advocate or the advocacy group

4. Office Contribution And Effectiveness

- How are passion and strength, as well as considered thought, shown in the advocacy relationship?
 - How are issues vital to the person's/people's well being followed up?
 - How are pressured, yet reasonable, expectations and timelines negotiated?
 - How is a sense of urgency maintained so that things continue to happen for the person/people?
-
- How is loyalty to the person/people described and demonstrated?
 - How is loyalty described to families and service providers?
 - How is loyalty to the agency versus loyalty to the person/people managed?
 - How do advocates describe the difference between a compromise and a sell-out?
 - How are long term relationships maintained?
 - How is social overprotection avoided?
 - How do people celebrate gains together?
 - How are long term formal and informal relationships found and supported?
-
- How realistic are people involved in advocacy efforts about the possible costs to self and others?
 - What are some indicators that suggest that advocacy hasn't been too easy?
 - How do people get extra support when the going gets really tough?
 - What role does governance/advisory/core group play in the support of staff/advocates when the going gets tough?

This next set of questions considers the **work of the paid staff** in relation to the demands of the job. Clearly the role of paid staff will be different for different forms of advocacy.

For example, the Citizen Advocacy coordinator will recruit, match and support unpaid advocates in freely given relationships, whereas staff in an individual or systems advocacy organisation are more likely to be paid advocates.

Many of the questions below are also an integral part of running any organisation and are detailed in the Disability Services Standards. The areas of recruitment, learning, and support of advocates are also a key part of this process. These areas have already been detailed earlier as part of the advocacy filter in 'By Whom' (see page 23).

- How are the agency's mission, objects and priorities played out by staff?
 - How are organisational roles, policies and practices reflected in the work of the office?
 - How effective is the balance of activities that happens in the office?
 - How well is the office managed?
 - How is teamwork developed between staff members?
 - How is professional supervision of the coordinator/director and advocacy staff conducted?
 - How are regular formal staff appraisals conducted?
 - How is a staff development strategy developed and financed?
 - How are good human relations practices evident?
 - Is work in keeping with recognised awards and health and safety practices?
 - Is a complaints mechanism available to staff?
 - How is the day-to-day work of the office and of the staff reflected upon?
 - How well are the office and the administrative efforts maintained?
 - Are good records of all financial transactions kept?
 - Are clear financial reports produced which are overseen by the Treasurer and reviewed by the governing committee?
 - Does the office maintain a database and keep relevant up to date records and statistics?
 - Does the coordinator/director submit a written report to each governing committee meeting?
-
- Are people doing/supporting advocacy and not something else?
 - How do people know if the advocacy is good advocacy on behalf of the person/people?
 - How well are people doing what they say they are supposed to be doing?
 - How well are the principles of advocacy used as the basis of the advocacy efforts?
 - How well are resources targeted to those in need of advocacy?
 - How well do people know about and analyse vulnerable people's situations?
 - How well do people set goals, strategise and maximise/support advocacy efforts?
 - How well do people act/support action on behalf of people with disability?
 - How well do people contribute to justice and wellbeing of people with disability?
 - How do people continue to stay grounded in the lives of people with disability?

Management of the work of the agency

Overview of the core advocacy effort

Overview of the core advocacy effort (continued)

- How do people know if they are really making a difference or are causing further unintentional harm to people with disability who are already very vulnerable?
- How is relevant data kept about all contacts with the agency?
- Are there sufficient staff to provide the core advocacy effort?
- How does the agency acknowledge and celebrate the good outcomes for people with disability that result from the work of the agency?

5. Organisational Continuity And Stability

The final set of questions considers stewardship and governance of the organisation into the future, and includes leadership development and renewal, and funding concerns. Again, many of the questions below are an integral part of running any organisation and are also detailed in the Disability Services Standards.

Governing committee

- How are people from the local community, with a strong sense social justice and a commitment to bettering the lives of people with disability recruited?
- How are people encouraged to consider taking on a role in the governance of the organisation for at least a two-year commitment?
- How well are members connected in the diversity of the local community?
- How well does the governing committee reflect a balance of skills, identities and abilities?
- How well are expectations communicated to prospective governing committee members?
- How do members learn about advocacy and its principles?
- How do members learn about the role of the organisation and of its staff?
- How do members develop an understanding of and a commitment to the stewardship of the organisation, its advocacy function, its values and its people?
- How do members gain a sense of the issues and situations confronting people with disability associated with the agency?
- How are good relationships fostered between governing committee members, the coordinator/director and other staff?
- How are members supported in their roles to build their knowledge of advocacy and/or governance of the organisation?
- What administrative assistance is provided to committee members in their governance roles?

- How are the agency's mission, objects and priorities developed?
 - What processes demonstrate active principled policy development?
 - Does the organisation develop and monitor a 5 yearly strategic plan?
 - Does the organisation establish yearly priorities?
 - Is a yearly budget developed in line with the strategic plan and the priorities of the organisation?
 - Does the organisation produce a report for the AGM in line with organisational mission, goals and priorities?
 - Are there clear policy guidelines that help to clarify decisions about whom the agency can and can't work with and/or how many people can be supported in advocacy relationships at any given time?
 - Do the governing committee members review organisational policies and procedures on a regular basis?
 - What evidence is there to suggest that the governing committee grapples with values questions that arise in the operating of the office?
 - How does the organisation deal with and balance antagonistic functions?
 - Does the organisation have a well-publicised complaints mechanism?
 - Does the organisation plan for and hold a 5 yearly external evaluation with peers involved in advocacy work?
 - Does the organisation work in keeping with the legal requirements of the Acts governing the running and funding of the agency?
-
- How does the agency ensure stable funding sufficient for the advocacy effort?
 - Does the agency compile and submit reports as required by funding agreements?
 - How is the issue of diversity of funding viewed?
 - How are people identified and mechanisms explored that might lead to avenues for diversifying funding?
 - How are any alternative funding sources sought?
-
- How is wider knowledge of advocacy developed by the agency?
 - How are opportunities provided for the wider community to be involved in understanding and supporting the agency's efforts
 - What capacity does the organisation have to attract people to the cause?
 - How is the history, culture and work of the organisation transmitted to others

Policy development and planning

Funding

Continuity over time

**Continuity over time
(continued)**

- How does the agency encourage ways in which interested people can find a place in the work of the organisation and learn more about advocacy?
- What roles do advisory committees play?
- How are potential members of advisory or reference committees found?
- How is new leadership identified and supported?
- How capable is the agency of continuing long-term relationships with people?
- In what broad ways have the agency's advocacy efforts been legitimised?
- What contribution does the agency give/get to/from other advocacy groups and the wider advocacy fraternity?
- How does the organisation celebrate significant achievements and milestones?

**SECTION 5
About Continuous Improvement And Change****1. Where to from here?**

Any evaluation should lead to consideration of the future

An external evaluation is usually about what is happening now. However if this is as far as it goes, little benefit will have come from such a process. Evaluations serve no purpose if they are to sit in a filing cabinet and not be acted upon. For continuous improvement to happen, people involved in advocacy will need to persist with the process of consolidation and change and attempt to build in other elements of reflective practice.

An external evaluation should set the direction for thinking, debate, challenge and change for an organisation well into the future. Following the presentation of an external evaluation report to the organisation, a plan for change can be developed which incorporates suggestions about how strengths can be built upon and weaknesses can be addressed. The following process may be of help in determining the next steps.

1. *Reflecting on the implications of the report by the steering group, and encouraging and enabling a positive response by the organisation*
2. *Pulling out key elements to be addressed and, if strong disagreement about an aspect, developing a clear rationale for its rejection*
3. *Incorporating changes into the organisation's strategic planning processes and considering how these can be managed and resourced*
4. *Organising, by priority, how changes will happen and developing a managed change strategy for each aspect of the change process.*

Consideration of the report

Rationale for change/rejection

Incorporation into planning

Priorities for change

Continuing the process of strategic questioning is more likely to lead towards doing things in a more considered and planned way, (CRU, 2002). Further questions can now focus on the following areas:

Nature of the questions	Content Focus
Visioning	
<ul style="list-style-type: none"> • How could this be better? • What would things look like if this were happening? 	<p><i>Identifying the dreams and ideals that need to be central to the change process</i></p>
Change	
<ul style="list-style-type: none"> • How have others gone about this? • What would it take to change this? • How do we get stronger? 	<p><i>Considering how to move from the present towards a more ideal situation</i></p>
Obstacles	
<ul style="list-style-type: none"> • What prevents us from doing this? • What external forces are against this? 	<p><i>Identifying personal, organisational and systemic obstacles and how they could be dealt with</i></p>
Personal Inventory and Support	
<ul style="list-style-type: none"> • What can I contribute to this? • Who could help us make a difference? 	<p><i>Identifying personal interests, potential contribution of others</i></p>
Alternatives	
<ul style="list-style-type: none"> • What are some wild ideas about how we could do this? • What are lots of ways that these things could be done? 	<p><i>Examining the possible options to achieve the vision and changes</i></p>
Consequences	
<ul style="list-style-type: none"> • What would happen if we tried this? • How would individuals feel about doing this? 	<p><i>Exploring the consequences of each alternative</i></p>
Personal Action	
<ul style="list-style-type: none"> • What are our first steps? • Who do I need to talk with? • What role am I taking in the change process? 	<p><i>Getting down to planning and action.</i></p>

2. More strategic questions

Visioning
Change
Obstacles
Personal Inventory and Support
Alternatives
Consequences
Personal Action

And so the cycle continues

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The Advocacy Development Network hopes that this paper will encourage critical thinking in our sector and will help to stimulate and continue the development of good advocacy on behalf of people with disability in Queensland.

This paper has been developed in the spirit of continuing to imagine better and wanting to do better in our advocacy efforts.