CHCADV002
Provide advocacy and representation services

Release 1

Learner guide

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Provide advocacy and representation services

Learner guide

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Contents

Before you begin

This learner guide is based on the unit of competency *CHCADV002 Provide advocacy and representation services*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	▶ Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	▶ Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. ▶ Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	▶ Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	▶ Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	▶ Key learning points are provided at the end of each topic.
Learning checkpoints	▶ There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Learning	▶ Understanding your job role, organisational procedures and legal responsibilities ▶ Managing your work and seeing how well you are going and making goals for yourself at work ▶ Seeking professional development opportunities for continuous improvement
Reading	▶ Understanding how documents are presented and being able to navigate through documents ▶ Understanding industry- and job-specific terminology ▶ Interpreting key information in relevant documents ▶ Understanding routine workplace checklists and documentation
Writing	▶ Planning, drafting and writing reports and documents ▶ Communicating through written letters, email and online ▶ Recording progress; reporting incidents
Oral communication	▶ Clarifying instructions ▶ Providing information ▶ Supporting others through encouragement, negotiation and conflict resolution ▶ Using body language to model desired behaviour and responding to others' body language
Numeracy	▶ Calculating costs, weights, measurements of height and distance ▶ Interpreting measurements
Teamwork	▶ Working well with other people by cooperating, collaborating, encouraging and building rapport
Planning and organising	▶ Planning your workload and commitments ▶ Implementing tasks ▶ Completing work on time ▶ Knowing how to deal with hazards and risks
Making decisions	▶ Understanding and applying decision-making processes ▶ Reviewing the impact of your decisions
Problem-solving	▶ Identifying problems ▶ Working out how to fix a problem using problem-solving processes and reviewing the outcome
Innovation and creation	▶ Recognising opportunities to develop and apply new ideas ▶ Generating ideas by thinking of new ways to do something ▶ Making suggestions to improve work

Foundation skill area	Foundation skill description
Technology and digital literacy	▶ Efficiently using digitally based technologies and systems correctly and safely ▶ Accessing, organising and presenting information ▶ Using equipment correctly and safely

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcomes	Rate your confidence in each section
Topic 1 Establish the representative role and process	1A Identify role, processes and conditions of representation in consultation with individuals and key groups	☐ Confident ☐ Basic understanding ☐ Not confident
	1B Identify and seek the support of key people and develop strategic alliances	☐ Confident ☐ Basic understanding ☐ Not confident
	1C Determine and implement requirements for reporting, accountability and evaluation	☐ Confident ☐ Basic understanding ☐ Not confident
Topic 2 Represent the interests of the client or client group	2A Identify relevant interests and concerns to be pursued in accordance with organisation objectives and priorities	☐ Confident ☐ Basic understanding ☐ Not confident
	2B Undertake work to provide a framework for pursuing promotion of relevant interests	☐ Confident ☐ Basic understanding ☐ Not confident
	2C Create and respond to opportunities to reflect, promote and represent identified interests	☐ Confident ☐ Basic understanding ☐ Not confident
	2D Determine the impact developments and decisions will have on objectives and priorities and how to measure success	☐ Confident ☐ Basic understanding ☐ Not confident
	2E Provide progress and other reports and feedback to key people	☐ Confident ☐ Basic understanding ☐ Not confident

Topic	Key outcomes		Rate your confidence in each section
Topic 3 Negotiate outcomes and liaise with key people	3A	Communicate and promote purpose and objectives	☐ Confident ☐ Basic understanding ☐ Not confident
	3B	Promote and facilitate collaborative planning and action	☐ Confident ☐ Basic understanding ☐ Not confident
	3C	Identify potential areas of conflict and implement strategies to address them	☐ Confident ☐ Basic understanding ☐ Not confident
	3D	Undertake appropriate work with organising committees and boards of management to maximise effectiveness	☐ Confident ☐ Basic understanding ☐ Not confident
Topic 4 Evaluate the effectiveness of strategies	4A	Analyse actual work outcomes and document and report against agreed objectives and priorities	☐ Confident ☐ Basic understanding ☐ Not confident
	4B	Implement adjustments to strategy according to the evaluation	☐ Confident ☐ Basic understanding ☐ Not confident

Topic 1

In this topic you will learn how to:

1A Identify role, processes and conditions of representation in consultation with individuals and key groups

1B Identify and seek the support of key people, and develop strategic alliances

1C Determine and implement requirements for reporting, accountability and evaluation

Establish the representative role and process

Community services workers are often required to represent the individuals or industry they work for. This representation may be within the community services sector, to the broader community, or to decision-making groups or individuals. Workers need to establish their role and the processes of representation prior to actively engaging in advocacy.

As a community services worker, you need skills in complex communication, presentation, negotiation and consultation to successfully represent the interests of individuals and groups and their industry. You also need to demonstrate cultural awareness and have the ability to develop relationships with the people you are working with and for.

1A Identify role, processes and conditions of representation in consultation with individuals and key groups

Community service workers may represent individual service users, the community, a specific group within the community or a group of community services organisations regarding their needs, concerns or issues. Workers need to clearly identify their specific role when representing others, whether this is to influence decision-making, to advance the interests of those they represent or to represent clients or the industry. They need to identify the processes and conditions applicable to their representative role. Workers must also consult the people they are going to represent, and other key individuals and groups, to confirm their role and the processes to be used.

Representation and advocacy

Representation and advocacy are two similar social justice processes. The following information explores the role of representation and advocacy. Both processes are essential aspects of community services work, ensuring positive change for individuals, groups or the community. Some individuals or groups may not be able to represent themselves. This may be for a number of reasons; for example, because people do not have the skills or knowledge needed to represent themselves on a particular issue, or because they may have an illness or disability that prevents them from doing so.

Representation and advocacy

Representation services approach decision-makers, the media or the community on behalf of another person or group to promote their interests.

Advocacy allows clients the opportunity to voice their opinions and needs through an advocate who speaks, argues and stands up for their needs, rights and opinions in order to secure a benefit for them. Some people advocate for themselves, or people requiring advocacy may be a single person, a citizen or parent, an organisation or industry.

Your role

When you identify your role to others, this means you are outlining the job you will perform to the people or group you represent. By clearly stating your role you are nominating yourself as the person who represents the interests of the client. You are the person who will manage the collection and recording of information, and take action. You may be involved in:

▶ promoting and developing the interests of the community services industry you represent in public forums by representing clients, services organisations, specific programs and education services for that industry, or by presenting current research and ideas

▶ advancing the interests of those you represent through participating in forums where decisions are formed or made

▶ taking action to influence decision-making by politicians or government departments through lobbying, using social media, creating a media campaign, writing advocacy letters or meeting with members of parliament.

The function

Advocacy and representation aims to promote the interests of a person or group and allows them the opportunity to voice their opinions to those who make decisions. The functions are to raise awareness of issues that may not be on the agenda and can have attention brought to them. An advocate acts on behalf of a group or person and represents them as their 'voice'. Raising issues means selecting and using the appropriate format to advance the interests of others and encouraging action and change in decision making.

Representation work

Three important aspects of representation work are listed below and an outline of the role of representation and the responsibilities of the role.

Assisting in the developing decision-making abilities

▶ The role is to develop a person's decision-making abilities by supporting them to learn skills, grow in confidence and knowledge, and become independent of you. You need to help the person to advocate for themselves by providing opportunities to practise skills, learn, and be successful in self-advocacy.

Providing education and information

▶ You are responsible for providing education and information about available resources and support and assisting people requiring advocacy support to access appropriate services. This may be as simple as providing written resources, teaching someone to search for information online or providing supportive referrals.

Providing advocacy support

▶ You need to actively support a person to be involved in the advocacy process by consulting them about their interests and required outcomes. This means involving clients in committees, supporting them to speak to decision-makers or at events, and including them in decisions about the advocacy strategies that will be used.

Working in the community services industry

To provide quality representation services, it is crucial that you have a clear understanding of the nature and structure of the community services and health industry. The more you understand the people or agencies you are representing, the better you are able to provide the best possible services. Consider the following information about the community and health services sector.

Agencies

Even if you are not working with all sectors, you should be familiar with the various agencies and the work they do, such as those related to aged care, disability work, youth work, counselling, community development, domestic violence, mental health, or alcohol and other drugs (AOD). In the health sector there are agencies that provide services and referrals for people requiring direct health care. For example, an organisation may provide referral information to a doctor, specialist or psychiatrist, counsellor or accommodation services for young people experiencing mental health issues.

Make sure you are familiar with the structure of each agency, the procedures to be followed, the values to be upheld, any gaps in services, and the key people who should be consulted for information and support.

Principles

Fundamental to work in the community and health services industries is acknowledging that everyone has basic human rights regardless of age, cultural background, gender, sexual preference, income or religion. These rights underpin the need to respect and value all clients, colleagues and members of the community and the legal requirement to provide ethical and equitable support or health services at all times.

Issues

Particular issues affect certain groups you may represent, such as issues relating to chronic illness, ageing, women, youth or Aboriginal and/or Torres Strait Islander people. For example, you may be representing:

▶ clients with mental health issues to government departments or hospitals

▶ mental health services regarding mental health legislation to parliament

▶ the aged care sector regarding funding to care facilities

▶ older people regarding pension levels

▶ organisations that provide financial counselling to clients who have significant debt

▶ tenants who have been unfairly evicted.

Processes to develop and promote interest

Representation involves using a range of public forums to increase understanding, interest and engagement of the community in the services provided by the industry. Often, community services organisations struggle to attract adequate funding and recognition of the work they do. The role of representation services includes developing the interests of the community services industry by using processes and systems to promote an idea or change a decision.

Consider the following information.

Developing and promoting interests may include:

▶ running a media campaign using well-known Australians to encourage health checks or decrease stigma around mental health issues

▶ presenting at conferences to increase the industry's profile and improve understanding of the services provided

▶ running a social media campaign to increase engagement with young people

▶ participating in networking meetings to strengthen industry links.

Identify key decision makers

A community services worker advocating for a community group can advance the interests of that group, or the community in general, by participating in forums where decisions are debated and made. A forum is simply a meeting, debate or similar process where views, information and ideas regarding an issue can be discussed. Forums may take on many different forms of meetings. The following explains the representation role during forums.

Identifying key individuals, groups or stakeholders

▶ A representation service needs to identify key individuals or groups who make decisions or influence decision-making and engage with them. This may mean meeting with members of parliament, government department heads or lobby groups to present ideas, petitions, research findings, reports or recommendations. Alternatively, it may mean bringing together community leaders to discuss issues and possible outcomes. This requires the ability to identify community leaders and follow appropriate cultural protocols.

Following cultural protocols

▶ To ensure you follow cultural protocols, you may need to use cultural brokers who people (often community leaders) who facilitate relationships between two cultures. Their presence reduces the risk of conflict and supports the community services worker in any interactions with a cultural group. For example an Aboriginal elder may introduce you to the appropriate people, explain communication styles of the community or group, and discuss the approach and process for consultation with the community.

The role of representation

Representation services take action using a variety of strategies to influence decision-making processes. Representation and advocacy workers do not make decisions on behalf of the group or individual they are working with, but work alongside them. The following explores the role of the representation service in influencing decision-making.

Decide on action

The role of the representation service is to decide, in consultation with those they represent, what action to take. They develop strategic plans that take into consideration the individuals and groups to ensure the appropriateness of the planned action based on culture and abilities. A crucial underpinning principle is that representation and advocacy services do not make decisions on behalf of a client or a service provider, but work alongside those represented, or assist those represented, to develop the skills and knowledge to represent themselves.

Identify decision-makers

It is critical to identify and understand the power structures and relationships in the community. This knowledge enables you to recognise who decision-makers are and who can facilitate meeting them or influencing them; for example, it may be beneficial to form a working relationship with the community services manager at the local council who can work with councillors to approve funding requests or requests for resources such as the use of council buildings.

Take action

You may take action to:

▶ provide feedback to decision-makers on changes to legislation that may impact those you represent

▶ initiate a social media campaign to gather responses from stakeholders

▶ create an electronic media campaign to raise community awareness and support of an issue

▶ lobby politicians and government department representatives

▶ develop or strengthen partnerships and alliances with other organisations to increase effectiveness.

Influence decisions

You may need to take action to influence decision-making processes when:

▶ there are identified gaps in provided services; for example, insufficient support for carers

▶ there are proposed changes to legislation or services; for example, changes to Centrelink benefits for sole parents

▶ individuals or groups are being treated unjustly; for example, tenants being evicted without due cause

▶ you need to draw attention to an issue/group; for example, young people with high-care needs in aged care facilities.

Skills in representation

To represent individuals and groups, strong leadership and management skills are required. This involves having clear goals, listening to what others have to say, being inclusive, showing respect, being honest and fair, examining a range of options and making informed decisions.

There are many models and theories regarding leadership and management styles. The following outlines four models that may help you define your role and think about your style of leadership.

Trait

The trait model explores the patterns and characteristics of effective leaders, based on the idea that effective leaders have something that other people do not. Critics of this model point out that no set of traits has been identified that can explain good leadership, and that a good leader in one situation may not be a good leader in another.

Behavioural

The behavioural model explores leadership styles and what effective leaders do, rather their traits. An example is the managerial grid model, which is based on the leader's concern for the task versus their concern for people. It suggests that the best style is one that balances the two concerns. Critics argue that a leadership style that works in one situation may not work in another.

Contingency

Effective leadership is a combination of the relationship between the leader and followers (the leader is more effective if respected by followers); task structure (clear goals and strategies make the leader more influential); and job power (leaders given power to get the job done are likely to be more influential). Critics point out that the impact of culture and gender are not considered.

Transformational

Transformational models discuss leaders who inspire their followers to change and improve. Leaders create a vision to inspire and motivate others to achieve set goals, and build relationships based on trust. Critics argue that there is no way to measure the impact of a charismatic leader.

Represent individuals and groups

The processes involved in representation may differ depending on who is being represented and to whom. It is essential to be aware of the processes required by government departments, members of parliament, peak bodies and industry groups. For example, there is a very specific process in approaching a member of parliament to represent an individual, group or issue. There will be different processes required for individual and group advocacy. Consider the following information that relates to the representation process.

Individual advocacy

Individual advocacy focuses on changing the situation or protecting the rights of one person. This can be a person representing themselves or using an advocate to act on their behalf. Processes may include meetings or written or electronic communication with government departments, businesses or other individuals to advocate for the person. This may be a client who is being evicted from a rental property or who cannot afford to pay an electricity bill. Other processes, such as using the electronic media, can also be implemented in individual advocacy.

Group advocacy

You may be providing advocacy services for a group and be focused on changing the situation of a group of people who share a similar issue or require similar services. Examples of this may be improving services for people with mental health issues, or changing legislation to improve the financial situation of single parents. Representation may include processes such as presenting to decision-makers, using petitions, using media resources and electronic campaigning, organising marches or rallies, and working to change legislation or policies.

Organisational goals and objectives

You need to consider your own organisation's goals and objectives, and ensure you follow approved processes and structures to meet these. For example, your organisation may have specific processes for approaching decision-makers, which may include which staff can be involved in this (such as management, board members or approved staff), how the organisation's name and logo is used, and what requires board approval. Organisations will also work within a set of policies and procedures that reflect the organisations goals and objectives. It is necessary to know and understand these policies and procedures.

Work within your own work role

Understanding the boundaries of your work role means that you work within the organisation's policies and procedures and seek assistance or supervision as required. Your job description outlines the parameters of the role and working as a part of a team means consulting and sharing information with others and asking for advice when required.

The representing process

The following explains the process that a community services worker may follow in representing a group or an individual.

Representing a group:

▶ Consult those being represented.
▶ Identify the roles of each person and the process of representation including timing, resources etc.
▶ Identify key partnerships and alliances that will be beneficial.
▶ Negotiate goals, outcomes and actions to be taken.
▶ Take agreed action.
▶ Evaluate the success of the action and review outcomes.

Conditions of representation

When community services workers are engaged in providing representation services, there are a range of conditions that are likely to impact on the services provided and need to be considered during the representation process. The conditions are listed below.

Representation conditions

▶ Authorisation, accountability and protocol

▶ Consultation and delegation

▶ Developing an industry position

▶ Existing community structures, systems, networks and processes

▶ Requirements of industry mechanisms

▶ Resources

▶ Scope, scale and parameters

▶ Terms of reference

Authorisation, accountability and protocol

Before a representation service takes action, staff need to consider who can authorise the action and who will be accountable for the action and outcomes. They also need to ensure the action follows legislative and regulatory standards or whether it breaches cultural, community or industry protocols. For example, service providers need to:

▶ consult community leaders, industry representatives and experts to ensure protocols are followed and proper authorisation is given

▶ identify relevant legislation, policies and regulations and ensure requirements are met.

Approach those from culturally and linguistically diverse backgrounds

Approaching the incorrect person or not following protocol may lead to the representation not being consented to. It is particularly important to follow protocol when approaching individuals or groups from culturally and linguistically diverse backgrounds.

A good place to start in increasing your knowledge is with leaders within cultural communities. These are key people to consult and they can also be cultural guides in assisting you to understand the people you represent. It is very difficult to know all the complexities of every culture present in Australia, so it is important that you are able to demonstrate the appropriate communication skills, ask appropriate questions and listen to the interests, needs and concerns of the people you represent.

Follow cultural protocols

Understanding cultural issues, including communication protocols, cultural beliefs, gender and family relationships, is essential to the representation process. Here are some considerations regarding cultural protocols.

Consider the following:

▶ Language – what is the individual or group's first language? Can they communicate effectively without an interpreter?

▶ Eye contact – in some cultures, it may not be appropriate to make eye contact with someone older than or senior to you.

▶ Nonverbal communication – many cultures, such as Aboriginal and/or Torres Strait Islander cultures, use a lot of nonverbal communication.

▶ Silence – in many cultures silence is a sign of respect, of giving serious thought to an issue, or it may indicate that the conversation is inappropriate.

▶ Gender – in some cultures and religions, individuals may be uncomfortable working with someone of a different gender from their own.

▶ Respect – in some Asian and African cultures it is not appropriate to challenge anyone in authority, so meeting with authorities requires skill.

Consult with others

Consultation, or discussion with individuals and groups, is vital for any representation service, as described below.

Consultation provides:

▶ a clear picture of the needs, issues and concerns of the individuals or groups being represented

▶ an understanding of the requirements and expectations of government, politicians and decision-makers

▶ opportunities to form a delegation, which is an individual or group who has been given authority to represent another person or group.

Existing structures, systems, networks and processes

Identifying existing community structures and networks, and understanding processes and systems within the community can save you time and energy. Existing community structures may be governmental (for example, local councils or state governments), industry networks (for example, the Youth Participation Practice Network in Victoria), community networks or multicultural or religious groups (for example, the Islamic Council of Australia).

Processes and systems may include procedural processes such as meeting with ministerial staff prior to meeting with a government minister or representative, or accessing existing advocacy systems through advocacy organisations. Some representation groups will also take the role of advocate themselves.

Knowledge of existing structures, systems, networks and processes can be used to:

▶ identify key people, community leaders and alliances within the community to support the representation

▶ gain access to existing networks to streamline consultation processes

▶ ensure representations are appropriate

▶ gain an understanding of the community's needs, concerns and issues, and of who can assist in facilitating change in the community.

Requirements of industry mechanisms

Each industry has a set of mechanisms, each with its own requirements. The following outlines some of these requirements.

Advisory, steering or reference committees

A group may be needed to provide expert advice and guide workers and services regarding cultural issues and values. For example, it is essential to have an Aboriginal advisory group if working with people who are of Aboriginal heritage.

Conferences and seminars

Attending industry- or issue-based meetings where current issues, the latest research and best practice are presented and discussed is essential for maintaining currency; for example, geriatric care conferences, a state youth conference or cultural awareness seminars.

Electronic advocacy and campaigning

Using electronic means to advocate for change is effective in the media age; for example, social media such as Facebook and Twitter, and online petitions like Getup or posting clips on YouTube.

Education and training

The community services industry requires workers to have formal higher education and vocational education qualifications. Organisations should also offer internal training opportunities to update and improve worker skills.

Formal and informal networks

Formal industry networks meet regularly to discuss relevant issues, whereas meeting with key people informally provides opportunities to remain current, learn and offer support and guidance when needed.

Formal representative positions

There are many occasions when a service needs to engage legal representatives, guardians and representatives specialising in areas such as women's issues, accommodation and child protection.

Peak industry and professional organisations

It is beneficial to belong to a professional organisation to take advantage of seminars offered, access current research and have the opportunity to maintain networks. Examples include the Youth Affairs Council Australia and the Australian Council of Social Services.

Publications

Industry journals and organisation/peak body newsletters provide access to industry news, research and case studies; for example, *Of substance*, *Journal of intellectual and developmental disability*, *Australian journal of social issues*.

Submissions

Representative services may need to prepare written and/or verbal proposals to decision-makers or groups regarding changes to legislation or policies, or to improve service provision.

Resources for representation

You need to evaluate what resources are needed and what resources are available to provide effective representation services. These include the following resources and information.

Resources

Resources may include:

▶ human resources such as workers, key people and community leaders

▶ other resources such as financial and training resources, online access, time, available meeting spaces, etc.

Information

It is crucial to know:

▶ how much funding is available; for example, to print posters and brochures

▶ how many people are available; for example, to participate in a march

▶ the availability of key people to provide support.

Scope, scale and parameters

Representation services need to clarify the scope, scale and parameters of the services they will provide to ensure everyone works within the agreed measurements of service. Workers also need to be aware of the group's terms of references, as explained below.

Service scope, scale and parameters

▶ Scope refers to the extent of what is relevant.

▶ Scale refers to the size of the service provided.

▶ Parameters refer to a set of measurable factors.

Terms of reference

▶ Terms of reference are guidelines that describe a group's purpose and roles and how the group will work together. Existing terms of reference for the representation service should be followed. New alliances, partnerships or working groups may need to establish their own terms of reference that spell out the roles of participants, the purpose, outcomes and expectations.

Example

Identify role, processes and conditions of representation in consultation with individuals and key groups

Sally has just been successful in securing an advocacy role at a local service that provides emergency relief, referral, parenting, youth and legal services to the local Aboriginal and Torres Strait Islander community. Sally has no previous experience as an advocate and is unsure how to go about her role. She identifies the role, processes and conditions of representation by consulting with key people.

She begins by asking her manager to identify key community leaders for her to meet. She organises a morning tea and invites these elders to meet with her. She spends time listening to them and finding out what issues are most concerning for them. She also asks how they would like her to consult other community members and what they would like her to do to address the main issues identified.

Sally then meets with other local community services workers to learn from their experiences in the community and to develop alliances to begin the representation process. She also meets with staff at a university's Aboriginal centre to gain knowledge of successful services and available resources. Finally, Sally consults local council community services staff to identify any available resources and support they can provide.

Practice task 1

1. Explain representation and advocacy.

2. What is the role of decision-making in representation on behalf of a client?

3. What is the difference between individual and group advocacy? Give an example of each.

4. Explain why it is important to work within your organisational goals and objectives.

5. Why is it important to understand your job role?

6. What are the conditions that need to be considered and may impact on the services in representation?

Click to complete Practice task 1

1B Identify and seek the support of key people, and develop strategic alliances

Representation services are more effective and manageable with the support of key people who can provide knowledge, expertise, access to individuals or groups, and resources. Developing strategic alliances with key people and groups means you can work together to improve the effectiveness of the representation process, the conditions and its outcomes.

Consulting with key people is an essential component of providing representation services. People with specific expertise and knowledge can help develop consultation and accountability structures that provide you with the opportunity to make the most efficient use of your resources. Consider the following information.

A consultation structure sets out the process to be followed; that is:

▶ Who will be consulted?

▶ What needs to be discussed?

▶ In what order do discussions need to occur?

▶ What follow-up will be done?

▶ What is the time frame for the process?

▶ What are the expected outcomes?

Identify key people

Identifying individuals, groups and organisations that can support and promote the representation service is a vital component of your role. Developing strategic relationships with these people can improve the effectiveness of your representation. No matter how skilled you are, linking with others brings additional skills, knowledge and resources to the service provided.

A strategic alliance is an agreement between two or more individuals, groups or organisations, to work together towards objectives and goals, while remaining independent. The following information provides some examples of the reasons for alliances. Note that in each, the alliance brings additional resources and influence to the representation process.

Benefits and potential difficulties

The following presents the benefits of and challenges with strategic alliances.

Benefits of strategic alliances

▶ Pooling the human, financial and other resources of multiple parties

▶ Increasing understanding of the interests and concerns of those represented due to multiple perspectives

▶ Learning from others in the alliance and access to additional individuals or groups to consult

▶ Increased impact in strategies; for example, lobbying

▶ Potential to improve the profile within the community

Potential difficulties with strategic alliances

▶ Relationship development requires time

▶ Conflict relating to different objectives, priorities or values

▶ Communication channels increase requiring close management

▶ Not all stakeholders being happy with the alliance

▶ A drain on resources if all alliance partners do not participate or contribute equally

▶ The need to ensure each organisation does not become dependent on each other

Identify alliances

Consider the following regarding identifying alliances.

Benefits

You need to decide why an alliance may be useful. Is there a need for more people? Is there a lack of expertise within the organisation that an alliance would provide? Is there a particular resource that the organisation does not have access to?

Networks

Once the benefits have been identified, you need to explore possible alliances. Begin with you and your organisation's networks. Are there individuals, groups or organisations already known that can increase the effectiveness of the representation?

Key people

Look at the key people you consulted in the early stages of the representation (for example, community leaders, researchers, organisations, peak bodies and experts) and identify any possible alliances within this group.

Consultation

Consult these key people again to gain assistance in identifying alliances. It is also useful to explore whether significant community leaders or decision-makers may increase the impact of the representation through an alliance.

Develop alliances

After the need for alliances and potential alliance members has been identified, work to develop these alliances and provide leadership in this development. To do this, follow these steps.

How to develop alliances

▶ Check your organisation's policies. Ensure you follow the organisation's policies, including informing or gaining authorisation from appropriate people such as your board of management, the CEO or your supervisor.

▶ Consult with key people regarding the need for alliances and what an alliance would bring to the representation service. Gain agreement from key people to develop alliances.

▶ Approach the identified individuals, groups or organisations to propose an alliance. Ensure you identify the appropriate person within a group or organisation to approach.

▶ Negotiate terms. Have a clear proposal for those approached – either in writing or a presentation – that clearly outlines the benefits for them or their clients in joining an alliance. State or negotiate a clear time frame for a response.

▶ Develop a formal agreement between all parties in the alliance. Have an outline of a possible agreement that can be drawn up during the discussion if appropriate.

Develop consultation and accountability structures

The following explains what is involved in developing consultation and accountability structures.

Consultation structure

Community services workers may need support to set up the consultation structure from someone who has experience in consultation or someone who has knowledge of the issue or community being consulted. For example, if you needed to consult an Aboriginal community in Arnhem Land, community leaders (elders) could provide information on when it is most appropriate to come, who should be consulted within the community, an appropriate meeting place, cultural protocols and an understanding of community expectations regarding consultation.

Accountability structure

Accountability structures identify how a representation service will measure and report outcomes, and who they will report to. This must be done prior to any representative services occurring. Key people can assist in identifying how the representation service will be held accountable, and to whom. The service is also responsible to the individuals or groups they represent, and needs to develop structures accordingly; for example, you may hold a meeting with a group of carers, after presenting a petition to the government minister, to report on the minister's reaction and any agreed action.

Key people for developing structures

The following sets out the key people and the support they provide for consultation, accountability and strategic alliances.

Community leaders

Support to develop consultation structures:

▶ Can provide information regarding who, when and where to consult

▶ Can provide information about community expectations and concerns

Support to develop accountability structures:

▶ Can identify community expectations and goals

▶ Participation can increase accountability to community

Experts and researchers

Support to develop consultation structures:

▶ Can provide examples of successful consultation structures

▶ Can provide feedback regarding planned structures

Support to develop accountability structures:

▶ Can assist in developing appropriate accountability structures

▶ Can provide examples of best practice

Policy-makers or decision-makers

Support to develop consultation structures:

▶ Can explain expectations of funding bodies or government departments regarding structures to be implemented

▶ Can assist with clear time frames for submissions or meetings

Support to develop accountability structures:

▶ Can explain expectations of funding bodies or government departments regarding accountability and reporting

▶ Can provide clear deadlines for reports and outcomes

Peak bodies and groups

Support to develop consultation structures:

▶ Can provide examples of previous consultations with specific groups

▶ Can provide knowledge of the most appropriate structures for members

Support to develop accountability structures:

▶ Can provide examples of previously used accountability structures and best practice for an industry or group

Industry position statements

Industry positions are statements explaining the views of an industry group, such as aged care, mental health, disability, youth work or health care, on a specific issue. Here is some more information.

The representation service needs to:

▶ identify or develop an industry position through consultation with key people or discussions with peak bodies

▶ gain a solid understanding of the industry they represent

▶ determine the client group

▶ identify the workers

▶ identify the services provided

▶ identify gaps in service provision

▶ determine the key people in the industry.

Develop industry positions

Community services workers who are providing representation services need a clear picture of the views of workers and service providers on current issues or concerns. If the industry does not have a clear position outlined, you may have to consult key people to develop one. Representation strategies such as lobbying or campaigning are much more effective if decision-makers are faced with a united front from industry.

Key people who can assist in the development of an industry position include the following.

Key people who can help:

▶ Community leaders who may provide access to individuals within their communities; or information on the views of their communities; for example, Aboriginal and Torres Strait Islander elders

▶ Experts who may provide support regarding current industry standards, and research; for example, experienced workers in the industry

▶ Mainstream media representatives who may provide opportunities to canvass a broader section of a community regarding their views; or who may help promote consultation sessions; for example, mainstream newspapers, radio and television representatives

▶ Policy- or decision-makers who may provide valuable information on policy directions or the political climate; or who can assist in creating industry position statements that will have an impact when providing representation services

▶ Resource managers who may provide support on the best way to manage human and other resources

▶ Service-user peak bodies and groups that can provide access to member organisations and outlines of previous industry positions

▶ Teachers and trainers who may provide resources and information based on their research

Example

Identify and seek the support of key people, and develop strategic alliances

Alannah works in an aged care facility in Western Australia that provides residential services for people with high-care needs. It is a non-government organisation that receives some government funding, but is required by government to have residents pay a bond to enter the facility. This system works well for single residents. However, if one partner of a couple needs care and the other person does not, the couple may be required to sell their home in order to fund care. This creates hardship for the non-residential partner.

Alannah develops an industry position by making contact and consulting with other aged care services across the state to develop an industry position on this policy. She first approaches Aged and Community Services WA (ACSWA), the largest peak body for aged care services in the state, to gain their support and assistance to access their partners and member organisations. She then organises a meeting with ACSWA and key representatives from the member organisations. She also invites the head of Edith Cowan University's Aged Services Management course and aged care consumer advocates. At this meeting, the group drafts an industry position on this issue.

Practice task 2

1. Explain why it is beneficial to seek the support of key people.

2. Why are accountability structures useful?

3. List some of the key people who can offer strategic alliances and support.

4. What is an industry position statement?

Click to complete Practice task 2

1C Determine and implement requirements for reporting, accountability and evaluation

Community services workers and representation services are accountable to the individuals or groups they represent, to their management or board, and usually to a funding body. They are responsible for providing the best possible advocacy and representation services. To demonstrate accountability, there may be a range of reporting and evaluation requirements.

Workers and services must work within relevant legislative and regulatory standards as well as organisational policy and ethical guidelines. This depends on the industry and the services being provided, but is likely to include legislation relating to work health and safety, privacy, equal opportunity and anti-discrimination. There may also be more-specific legislative requirements and standards, such as Acts relating to drugs or child protection and mental health or disability standards.

Reporting and accountability processes

Recording and reporting the representation (from the initial consultation and identification of roles, processes and conditions, through all aspects of the representation) are essential. This includes planning effectively for action, being accountable to stakeholders, raising the profile of an issue and improving the structures and processes for future representations.

Reports and records can be used as a measure of accountability. This is a measure of performance and can be used for evaluation and to review in terms of further improvements and effectiveness of the representation process. Consider the following.

Keeping accurate records

▶ You need to keep a record of all conversations, consultations and decisions made regarding your role and the processes and structures of the representation. Keeping accurate records allows you to keep track of who you have talked to and what you have done to help you decide what actions to take. This helps you make a stronger representative case. It also means that the evaluation can use the records to follow the process taken.

Consequences of ineffective processes

▶ Lack of reporting processes may lead to losing funding and the support of key people. These losses may ultimately lead to representation actions being unsuccessful. Reporting processes must be part of the accountability structures you develop alongside key people.

Requirements for reporting

The following reporting processes should be established during planning.

Content

In most cases, you need to report outcomes against agreed objectives. Reports may also include summaries of consultations, an explanation of actions taken or feedback from stakeholders. You may also be required to provide a financial report.

Time frames

Consider when and how often reports will be developed and distributed. Is there going to be a final report at the end of the representation alone? Will there be regular reports during the representation, such as quarterly or monthly?

Audience

Consider who the report is for and how this will impact the content. For example, are you reporting to funding bodies, or the individuals or groups you represent? Depending on the audience, you may need to include suggestions for improvements in future representations.

Format

You need to determine how the report will be given. That is, in writing, electronically or verbally. In many community services organisations, written reports are prepared and then presented verbally to interested parties or key people in a forum or meeting.

Accountability processes

While formal reporting is the most common form of accountability processes, accountability can also be achieved through other processes such as informal means. No matter what type of process is used, it needs to be agreed on and planned prior to any representation service taking place. Consider the following informal accountability means.

Other processes may include:

▶ posting photos or video on social media of actions or information; for example, a YouTube video of an expert speaking about family violence

▶ providing press releases to mainstream media on the issue, consultations or actions; for example, to explain report outcomes on aged care benefits

▶ presenting progress or outcomes to boards, committees or groups; for example, to parents of children with autism advocating for increased services.

Example

Determine and implement requirements for reporting, accountability and evaluation

The objective of a group of carers is to amend the *Mental Health Act 2007* (NSW) to increase the rights of carers to be heard in regard to the treatment of the person they care for. Katerina is a community services worker providing representation for them.

After consultation with key people, Katerina organises a petition that is taken to Parliament House by hundreds of carers and consumers via a march through the city and presented to the minister on the front steps. The media are informed and the march and presentation are given good media coverage locally.

During the initial stages, Katerina and her co-workers planned the reporting process and agreed that the representation service would prepare a written report summarising the:

▶ consultation process

▶ objectives of the representation

▶ actions taken

▶ outcomes of the actions

▶ recommendations for future action.

It was also agreed that Katerina would present the findings of the report to a group of carers at an organised forum. Katerina keeps detailed records of the consultations and the media interest, takes photos and video of the actions and researches statistical records relating to the petition. She also records the response of the minister to the petition and march, and the follow-up responses from the government regarding the changes to the Act.

Practice task 3

1. Why is it necessary to keep accurate records during the representation process?

2. How can information collected be used for accountability of a service?

3. Explain the four basic requirements for reporting.

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Summary

1. The role of representation may include taking action to influence decision-making by politicians or government departments; advancing the interests of those you represent through participating in forums where decisions are formed or made; and promoting and developing the interests of the community services industry you represent.

2. Community services workers may represent individual people, or groups such as community services organisations, specific programs and training or education services.

3. When providing representation services, consult key people to establish your role and understand their role to gain support for the representation service.

4. Key people, such as industry experts, researchers, peak bodies, educators, the media and community leaders, can help you identify appropriate processes and the impact of conditions.

5. Identifying or developing industry positions can strengthen your representation case.

6. Community services workers and representation services are accountable to the individuals or groups they represent, to their management or board, and to funding bodies.

7. Identify the people who can help you develop consultation and accountability structures.

8. Workers and services must work within relevant legislative and regulatory standards as well as organisational policy and ethical guidelines.

9. It is essential to report to agreed stakeholders in order to be accountable and improve representation services through evaluation.

Learning checkpoint 1
Establish the representative role and process

This learning checkpoint allows you to review your skills and knowledge in establishing the representative role and process.

Part A

1. Give an example of representation processes for both individual and group advocacy.

2. How can strategic alliances assist with the representation process?

3. Give some examples of legislative or regulatory standards that may underpin requirements for reporting, accountability and evaluation of a representation service.

Part B

Read the scenario, then answer the questions that follow.

1. Explain one of the functions of representation and advocacy.

2. How has the principle of human rights of the older people been addressed by the representation?

3. Who was making the decisions during the case study?

4. Why was it important to consult and negotiation with the members and key groups?

5. Why is it important that the worker adhere to the organisation's goals and objectives when representing the group?

6. What processes were employed to develop and increase the interest of the community in elder abuse?

Topic 2

In this topic you will learn how to:

2A Identify relevant interests and concerns to be pursued in accordance with organisation objectives and priorities

2B Undertake work to provide a framework for pursuing promotion of relevant interests

2C Create and respond to opportunities to reflect, promote and represent identified interests

2D Determine the impact developments and decisions will have on objectives and priorities and how to measure success

2E Provide progress and other reports and feedback to key people

Represent the interests of the client or client group

Representation processes often require community services workers to participate in decision-making forums. These forums may be part of a formal political process, informal meetings with government department representatives, meetings with community leaders or groups, or consultations with key people or groups. Community services workers need to develop a framework to use to promote and respond to opportunities relating to the interests of those being represented.

2A Identify relevant interests and concerns to be pursued in accordance with organisation objectives and priorities

When providing appropriate representation services, it is important to understand the interests, issues, concerns and backgrounds of the individuals or group you are representing. Equally important is to work with these individuals or group to identify their objectives and goals for the representation process. For this reason, your ability to communicate effectively with others is crucial. You also need to work within the priorities of your organisation and the position they hold on issues. For example, organisational priorities may require you to focus on a specific concern that is in line with the organisation's position. Identifying interests and concerns may involve consultation, needs assessments and research.

Represent all clients

You may need to consult with specialists within or outside your organisation to improve your understanding of legal issues to be prepared to work with people from a variety of backgrounds. There is sometimes a particular legal status that will influence your work such as power of attorney, guardianship or the legal status of parents or guardians of people under the age of 18. These issues may be relevant when working with people including those with disabilities, mental health issues or older people.

The organisation in which you work will have policies and procedures that reflect the objectives and priorities of the service when working with clients and specialists providing advice. Some examples of legal variations are explained below.

Power of attorney

▶ Power of attorney means that a person can appoint someone as their attorney, which gives them the legal right to make decisions for them. Power of attorney may relate to decisions about medical treatment or finances and may vary between states and territories.

Guardianship

▶ Guardianship occurs when a judge appoints an individual or organisation to take care of a child or an adult who is deemed incompetent due to disability or mental health issues. This person or organisation becomes responsible for the person's welfare until they are 18, or deemed competent in the case of adults.

A guardian's role

▶ Parents or guardians of people under the age of 18 are legally responsible for their care and protection. Parents and guardians have the right and responsibility to make decisions concerning daily care and control of the children in their care.

Respecting rights

▶ Working with young people raises complex issues relating to their rights, particularly when a young person becomes a parent themselves. You need to ensure the work you do is in line with industry ethical standards and respects the rights of those they represent.

Needs assessments

Needs assessment is the process of identifying the issues, interests and concerns of a person or group. This can be done through discussions with the person and with key people including experts and others who can provide advice.

A focus group setting is useful if people are able to get together in the one space. Alternatively, an interview can be conducted over the phone or electronic media, or a review of previous organisational cases can provide useful information. Through a focus group the objectives and goals of the representation process can be determined. Again, refer to the organisation's policies and procedures for information on how to approach specialists and arrange a focus group.

Research issues

Research skills are essential when providing representation services. Research can identify the social, economic and political factors that contribute to a concern, and identify industry and community positions or interests. For example, you may require knowledge about specific cultural groups or issues like ageing, disability, self-harm, mental health, alcohol and other drugs or chronic illness. There may be people in your organisation who can direct your research and having internet skills in this area is most useful.

You also need to work within the priorities and objectives of your organisation. An organisation may have a particular position they hold on certain issues that is a strong priority underpinning and directing the work of the organisation or service delivery. An organisational priority may require you to focus on a specific concern that is in line with the organisation's position. This may or may not align exactly with the specific concern of the group or person you are representing.

Research many involve:

▶ using your consultation with community leaders as a starting point for your research

▶ liaising with library staff who can assist you in researching specific subjects in your local area

▶ using databases, industry journals, online resources and organisational records.

Example

Identify relevant interests and concerns to be pursued

An association that works with Karen refugees (Thai people living in Myanmar) who have settled in your local metropolitan area has approached your organisation to assist them in improving services for their members, who are facing a range of issues in Australia. Here is how you could approach the task of identifying interests and concerns of the Karen community.

Research

You discuss the representation service you could provide with your manager to ensure you understand the priorities of your own organisation. After consulting community leaders and the association to establish your role and process, you begin by doing some basic research regarding the Karen people. You then set up a series of meetings with members of the association to identify their interests and concerns. As many of the members speak limited or no English, you realise you will need to work with an interpreter.

Needs assessment and consultation

You organise to meet with small numbers of members at each meeting to improve communication. During these meetings, you identify that the association's clients want to settle into Australia and provide educational and employment opportunities for themselves and their children. Their concerns are the limited English language classes available and the lack of training to help them settle into the community. This includes training in basic skills like shopping, banking, public transport and using electrical appliances.

Practice task 4

1. What can be achieved in a focus group?

2. Why can research into an issue be useful?

3. Why do you need to consider the organisation's priorities and objectives?

4. What is the legal status of a guardian?

5. What are the legal rights of people under the age of 18 years?

Click to complete Practice task 4

2B Undertake work to provide a framework for pursuing promotion of relevant interests

Once you have identified the interests and concerns of the individuals, organisation or group you are representing, the next step is to develop a framework for promoting these interests and concerns. This involves identifying a range of strategies to be used.

Strategies can assist in advocating for clients or services at a policy level to change legislation or government policies. Strategies can also assist in advocating for individual or groups of clients at a service delivery level. Remember that decision-making in the advocacy or representation process cannot be done for the client or client group. The process requires those represented to make their own decisions regarding their interests and strategy options, as listed below.

Strategy options to consider include:

▶ mainstream media and social networking sites

▶ presentations to stakeholders, the community or decision-makers

▶ public meetings and community education campaigns

▶ lobbying and networking

▶ publications and websites

▶ parliamentary committee hearings or inquiries

▶ debates

▶ test cases in court

▶ rallies, marches and demonstrations

▶ street theatre

▶ advertising campaigns.

The framework for promotion strategies

Selecting appropriate strategies for promotion is crucial, as the wrong strategy may damage your chances of success. The framework you develop for these strategies depends on your client group, the interests being promoted and the wishes of the people you represent. Continue to consult with those represented to ensure the strategies chosen reflect their interests.

The following table shows some promotion strategy examples in action.

Establishing a park

A local community group you are working with wants to turn some council-owned land into a park with a children's play area.

Strategies:

▶ Lobby local councillors.

▶ Hold community meetings to promote and gain support.

▶ Use local media to promote interests.

▶ Attend local council meetings and put the park on the agenda for discussion.

Legislative change

Sole parents want the federal government to reverse legislative changes to Centrelink benefits that have led to financial hardship.

Strategies:

▶ Lobby the minister and local members of parliament.

▶ Use social media to increase understanding and promote support.

▶ Organise a march in Canberra.

▶ Create an online petition.

Homelessness

Youth services want to raise the profile of youth homelessness to increase funding for support services, including accommodation.

Strategies:

▶ Use media and social media to tell stories to increase understanding and encourage young people to be involved.

▶ Use Youth Homelessness Matters day to promote the issue and explain solutions.

▶ Invite federal and state ministers to attend a forum.

▶ Present submissions to decision-makers.

Develop decision-making abilities

Your role is also to increase people's confidence and skills and assist them to develop their decision-making abilities so they can begin to advocate for themselves. This can be done through providing opportunities to practise skills, learn, and be successful in self-advocacy. All work undertaken must be carried out in an ethical, professional manner according to relevant legislation and organisational policies and procedures.

Assisting in developing skills may be done by:

▶ providing information on available services

▶ teaching people the skills to find and access services and resources

▶ supporting people to attend and participate in decision-making forums and to participate in self-advocacy options.

Model of community change

According to community organisation researcher Jack Rothman's model of community change, a community services worker needs to choose the best approach to bring about change. Rothman identified three frameworks for bringing about change: the social planning model, the locality development model and the confrontational model.

Strategies for each of these models are described below.

Social planning

The social planning model emphasises that experts are required for change to occur. Strategies include the following:

▶ Participate in boards or committees of decision-making organisations.

▶ Meet with government department representatives and politicians who can influence the decision-making process.

▶ Share your research with other stakeholders to promote interest.

▶ Organise partnerships or alliances to increase lobbying power.

▶ Provide those you represent with opportunities to speak at parliamentary hearings or inquiries.

▶ Organise public meetings or debates to promote interests and develop resolutions for change.

▶ Write press releases and briefing documents to promote the interests of those you represent.

▶ Work with legal advocates to develop a test case to bring before a court or tribunal where appropriate.

Locality development

Locality development is a participatory model of change. For change to occur, broad community participation is necessary. The aim of locality development is to get a group to reach consensus on common concerns and collaborate to resolve issues. Here are some of strategies:

▶ Organise specific, targeted community education campaigns.

▶ Use brochures, the media, public meetings, interviews and social media.

▶ Arrange community meetings to promote understanding of the interests of those you represent.

▶ Organise partnerships with community groups/leaders and other community services organisations to gain support and promote interests.

▶ Publically celebrate achievements by those you represent to ensure ongoing support.

Confrontational model

The confrontational model is also referred as the social or direct action model. In this model, action involves strategies to increase the power and resources of a group. Groups work towards changing systems, structures, policies and procedures to achieve social justice. Here are some social action strategies:

▶ Organise marches or demonstrations to promote the interests of those you represent.

▶ Develop advertising campaigns using graphic images of the issues faced by those you represent, as well as solutions.

▶ Organise street theatre to promote interests.

Develop a framework

There are some questions to ask to help you identify the most appropriate framework/model to follow for promoting the interests and concerns of your clients. Keep in mind that the people you represent may choose one or a combination of the following frameworks to meet their identified interests and concerns.

Social planning

Does change need to be at a policy/legislative level? Do you need to lobby for changes to laws and policies that currently disadvantage the people you represent? The social planning model provides a framework for strategic action.

Locality change

Do you need community support? Do you need to make incremental changes over time to build up this base level of support? Will the group be able to reach consensus and collaborate to make change? Perhaps the locality change model will be useful.

Social action

Do you need quicker change? Do you need to use direct action to change attitudes, promote the interests of those you represent and increase support? The confrontational model may be the most effective in this situation.

Example

Undertake work to provide a framework for pursuing promotion of relevant interests

To raise awareness of the impact of family violence on the community and to promote the right of individuals to be safe in their homes and communities, a peak body family violence uses a social planning framework:

▶ They have representatives on committees dealing with women's issues and family violence.

▶ They meet regularly with the Minister for Human Services to discuss legislative and policy changes, as well as best practice and research outcomes.

▶ They have developed working relationships with government agencies, particularly the police, housing and Centrelink to ensure the support of those they represent.

▶ Each year they organise a march through the city to honour those who have died that year due to family violence, and to promote the issue and the right for everyone to feel safe.

Practice task 5

1. Provide three examples of strategies that can be used during representation.

2. Why is it important to consult with the people you are advocating for when selecting from strategy options?

3. How can you increase people's confidence and skills and assist them to develop decision-making abilities?

4. What are the three models of community change according to community organisation researcher Jack Rothman?

Click to complete Practice task 5

2C Create and respond to opportunities to reflect, promote and represent identified interests

Promoting the interests of clients is not just something that happens once a year during a march, or a week dedicated to a particular cause. It is something that occurs regularly as part of your work role. You need to actively seek out and respond to opportunities to promote the interests or represent the client group. This involves reflecting on your work role and considering networks, events, meetings and partnerships in light of the interests of those you represent. You need to be able to motivate, teach and support the individuals or groups being represented.

Create and respond to opportunities

You may need to create opportunities to extend existing services to meet gaps or work to develop services as part of your work role. In other situations you may recognise opportunities that come up as part of your routine work role.

Opportunities that a community services worker can use in promoting an individual's or groups' interests include the following.

Events

You can take advantage of events organised by allies or the community, or organise events yourself. Examples include:

- ▶ running a stall or activity on sexual health at a high school's health expo
- ▶ joining a human rights march with banners supporting marriage equality
- ▶ distributing petition forms for recognition of carers at a carers' conference
- ▶ organising a community meeting regarding creating a local park.

Ensure the event meets your organisation's policies and that the timing does not interfere with other planned services. Networking may also put you in a position to find out about events planned by others and to gain access to their events to promote the interests of your client group.

Publicity/media

You can generate publicity through:

▶ creating press releases or media statements and inviting the media to cover your events

▶ inviting the media to visit the organisations or meet clients to hear their stories, interests and concerns

▶ using your organisation's social media accounts and website to promote interests

▶ producing posters and brochures

▶ organising celebrations for successes.

Your organisation's media policies may constrain some of what you can do. However, social media can be a powerful tool and may include promoting an event or petition on Facebook or posting clients' stories on YouTube.

Committee membership

Becoming a member of committee in the community, for another community services organisation or for an industry group provides you with the:

▶ opportunity to network

▶ chance to become aware of opportunities such as events

▶ opportunity to actively promote the interests of the individual or group represented.

Many community services workers participate in committees as part of their work role within the organisation's procedures. The opportunity to work alongside the community and other organisations is usually recognised as a positive strategy for the organisation.

Public presentations

You may present information to small or large groups, individuals or community or industry groups to promote the interests of the individual or group you represent. You may be asked to present at community forums or industry conferences as part of your work role. Alternatively, you may need to contact organisers to put forward ideas to present or organise public forums yourself to provide a platform to promote the interests and concerns of those you represent.

Presenting information may include:

▶ graphics and photos

▶ video and client stories

▶ statistics and case examples

▶ previous successes.

Policy development

You may have the opportunity as part of your work role, or may be able to create opportunities, to influence the development of policies that impact on the people you represent. Influencing policy development, or change, may be achieved through:

▶ meeting with or lobbying decision-makers

▶ presenting petitions or submissions to decision-makers

▶ having individual clients or groups participate in parliamentary hearings or inquiries

▶ developing or changing your own organisation's policies to reflect interests and concerns of a client group.

Special meetings/delegations

Your representation service may organise special meetings with, or delegations to, decision-makers. You can also take advantage of community meetings where decision-makers will be present. This needs to be done within organisational policies and, where appropriate, include the people being represented.

Lobbying is a specific strategy where you directly target those who can best change or address the client's situation or issue; for example, a local member of parliament to change a decision made by a government department, or to present a signed petition to a government department head or to parliament.

Example

Create and respond to opportunities to reflect, promote and represent identified interests

Susan is a worker in a large community services organisation that provides many programs in aged care, disabilities, youth work, financial counselling, emergency relief, housing and advocacy. As part of her role, Susan attends monthly regional networking meetings with other community services organisations. She also attends the annual industry conference.

Susan has recently started a representation service for a group of young mothers who cannot return to education or training due to a lack of affordable child care. Susan takes the opportunity at a networking meeting to discuss the issue with representatives from other organisations to gain support and develop an industry position statement. At the annual conference, Susan works with a group of young mothers to present a session. Industry and government department representatives attend the session. From this conference, a meeting is set up with an education department manager to develop educational options for the mothers.

Practice task 6

1. Provide two examples of opportunities that a community services worker can use in promoting an individual's or groups' interests.

2. Explain with examples how publicity can be used as a strategy for promoting the interests of a group.

Click to complete Practice task 6

2D Determine the impact developments and decisions will have on objectives and priorities and how to measure success

It is essential for representation services to assess the strategies they use, the decisions they make and developments that may occur in terms of how these will impact the objectives and priorities set in the initial stages of the representation process. This impact assessment should be done initially, and should also be ongoing as the representation progresses. The following information presents the considerations for assessing impacts.

Identify decisions and developments

▶ As part of ongoing assessment, you need to identify decisions and developments that may impact on your representation or advocacy service. These developments may relate to the community, group or individual represented, the organisation you work for or part of the broader social or political context. For example, a development may mean increased funding, it may change the priorities of key people or it may change how an issue is understood.

Assess the positive or negative impacts

▶ Each development needs to be assessed in terms of the positive or negative impact on the representation and whether the issue is an organisational priority. For example, the development may slow the process or an increase in public awareness may speed up governmental response to an issue. Always keep in mind your organisation's objectives for the representation and assess whether a development or a decision aligns with these.

Summarise the determining impacts on the person's objectives and priorities

▶ Here are the steps to be taken to review and reflect on the impact of developments and decisions to check if they reflect the person's objectives and goals:

– Identify decisions and developments that have occurred.

– Assess each development and decision in terms of a positive or negative impact.

– Consider the priorities of the community objectives and see if the developments and decisions are correctly prioritised.

– Revisit the plan or consult with key people again to gain some feedback.

– This should be done initially, and then on an ongoing basis as the representation progresses.

Identify developments and their impacts

You need to be aware of developments and possible impacts so you can respond appropriately. For example, you may need to revisit the plan or consult with key people again. The measure of success also needs to be clarified by reviewing the objectives and goals of the interest group. This involves going over notes and meeting with key decision makers in the group again. By providing feedback on the developments and their impacts, the group/client can determine and measure the success of the progress.

The following contains a list of developments that may occur, with possible impacts on the representation.

External environmental

Social, political, economic or industrial changes

Examples:

▶ Changes to social policy

▶ Change in priorities of the individual, group or community represented

▶ Changes to the industry or in industry position

Assessment of potential impact:

▶ Increase or decrease in funding or public awareness

▶ Changes to the type of action required

▶ Changes in support for representation

Within and outside the organisation structures

Examples:

▶ Changes in management, staffing or services provided

▶ Changes to funding arrangements

Assessment of potential impact:

▶ Changes in priorities of the organisation

▶ Lack of available staff

▶ Changes in staff working on representation

▶ Lack of funding for the representation service

Government policy

Examples:

▶ Changes to legislation

▶ Changes to government department policies relating to an issue

Assessment of potential impact:

▶ Impact on organisational structure and reporting requirements

▶ Changes to staff requirements

▶ Changes to funding requirements

Ideology

Examples:

▶ Change of focus for those represented or the organisation

▶ Changes in goals or expectations

Assessment of potential impact:

▶ Need to revisit the representation and promotion strategies to meet new priorities or goals

Education

Examples:

▶ Changes in education or training courses

▶ Changes to minimum educational requirements of staff

Assessment of potential impact:

▶ Changes to staff due to lack of appropriate education – slow down representation as new staff members catch up

Research findings

Examples:

▶ Increased knowledge regarding an issue

▶ Changes to the understanding of an issue

Assessment of potential impact:

▶ Change to focus or priorities of representation

▶ Increased/decreased support for representation based on research outcomes

Community change

Examples:

▶ Changes in concerns or interests of the community

▶ Changes to the urgency of an issue

Assessment of potential impact:

▶ Changes to priorities of the representation

▶ Changes to the action agreed on

Example

Determine the impact developments and decisions will have

An organisation is funded to provide crisis accommodation services, but has recently had to turn individuals away due to a lack of beds. The organisation's representation service, led by James, organises to meet with the state Minister for Housing along with a group of people who use the accommodation services. They have had previous discussions with the Minister regarding the need for increased funding, and the Minister's response has been favourable.

However, the following week there is a cabinet reshuffle and a new Minister is appointed. James requests a meeting with the new Minister and is informed that she will be in touch, but that priorities within the government have changed due to the current economic status. James immediately contacts key people and the organisation involved to discuss a response to this development, which may impact on possible funding, and further action.

Practice task 7

1. When should a review be done to check objectives and priorities are being met?

2. Select one development that may occur and discuss the possible impacts on the representation.

Click to complete Practice task 7

2E Provide progress and other reports and feedback to key people

Part of your role is to keep stakeholders and key people up to date regarding the representation process, either informally or through a formal reporting process. Representation services must also comply with all legal reporting requirements and regulations as well as the organisational requirements of a particular delivery service.

Here are the considerations to ensure stakeholders are kept up to date.

Monitoring

Keeping people up to date provides them with a feeling of involvement and gives them an opportunity to provide feedback on progress. It allows adjustments to be made to the process where required, and ensures that the representation service and worker are accountable for their actions. Always take notes of all communications and keep your reporting documents up to date with details of when monitoring occurred.

Accountability

Accountability – or being answerable to those you represent – is essential in providing representation services. In some cases you may be required to write reports for funding bodies to acquit grants or to ensure the continuation of funding. In these situations, you may be required to follow regulations and meet funding body standards. Reporting and documentation must follow the organisational processes for format and detail so they become an accurate record of what has occurred and when.

Celebrating success

There are also other reasons to report: celebrating successes with stakeholders, and the broader community, is a positive way of continuing to promote an interest and the services provided. The changes need to be publicised to ensure community members can make the most of them. Update records with information outlining successes and how this was promoted.

The information required

The following outlines the information that may be required by key people or groups.

Community leaders

Information required:

▶ Outcomes compared to the community's objectives

▶ Responses from other key people to their concerns

▶ Further support required from the community and its leaders

The media

Information required:

▶ The progress of the representation process

▶ Photos or videos from representation actions

▶ Outcomes of representations

Policy- or decision-makers

Information required:

▶ How decisions they have made, or not made, have impacted on your client group

▶ Further action that will be taken in the representation process

▶ Any required changes after the process begins

Researchers

Information required:

▶ Feedback on the impact of their research

▶ Feedback from other stakeholders

▶ Feedback on the accuracy of their research compared to representation outcomes

Service-user peak bodies and groups

Information required:

▶ Feedback on outcomes of actions taken

▶ Feedback on suggestions for future actions/strategies

▶ Suggestions for changes to industry position based on outcomes

Teachers and trainers

Information required:

▶ Information on education/training required by the client group represented

▶ Potential future training or education requirements

Experts

Information required:

▶ Feedback on outcomes

▶ Lesson learnt from the implementation of strategies

▶ Information on future actions

When and how to provide information

In most cases, time lines for reporting will be agreed to during the planning stages of a representation process, and accountability processes or reports may follow a number of formats. They may be written and presented either electronically or in a hard copy, or be provided verbally. These factors are explored further in the following information.

Progress and outcomes reporting

▶ Reporting may be at the end of the process, and reflect on the representation's outcomes in relation to the objectives identified during the planning process. Alternatively, there may have been an agreement for ongoing progress reports throughout the process.

▶ Providing ongoing progress reports allows stakeholders to be involved and provide additional input into the process. The end-of-process report presents information on the objectives achieved and future directions for the organisation and the individual or group.

Reporting formats

▶ While progress reports may be formal, feedback can also be informal. Opportunities to keep stakeholders informed during informal meetings, telephone conversations or emails are useful and can have positive impacts on the process.

▶ In general, reports need to follow the format required by funding bodies and organisational policies and procedures. In some cases the organisation will be sent a proforma or spreadsheet that must be completed. Reports may not be accepted if they do not follow the appropriate format.

Written reports

▶ Written report formats usually follow a logical structure with headings, and often use graphs and graphics to illustrate the content. This format makes it easy for readers to follow and keeps the information clear, specific and brief. Consider the language level, literacy and numeracy skills, and disabilities or abilities of those receiving the report.

Feedback formats

▶ Feedback can also be provided in other formats; for example:
  – presentations to key people using video, photos and information, or at meetings and public forums
  – publishing outcomes and future actions in organisational newsletters or on websites
  – sharing outcomes using social media.

Example

Provide progress, reports and feedback to key people

Here is an example of a progress report completed by staff at a community centre, for representation services to increase their profile in the community and to attract culturally and linguistically diverse people to the centre.

Monthly Progress Report for the Kintaala Community Centre

Date: March 2017

Summary of actions taken

A meeting with local community leaders to introduce the centre and discuss interests and concerns of their communities; representatives were from the:

▶ Burmese Association

▶ Asian Australian Friendship Club

▶ Macedonian Club

▶ Multicultural Association

Discussion with local newspaper regarding publishing a story about the community centre

Posters were developed for the community centre by advertising students from the local university

Summary of outcomes

The local newspaper will send a reporter and a photographer to the centre to take photos and prepare a story about the centre and its activities and services. We have agreed that it will appear on the front page and a further story will be written on the planned event.

Draft posters have been prepared for stakeholders' approval.

All community leaders are positive about the services the centre provides and are happy to promote it in their communities. They will also attend the multicultural event and involve their communities in the event.

Future actions

In the next two months, the following actions will take place:

▶ Publish a story in the local newspaper

▶ Meet with more community leaders

▶ Finalise and print posters

▶ Distribute posters to agreed spaces

▶ Organise a multicultural event at the community centre

Practice task 8

1. What are the benefits of keeping people up to date regarding progress?

2. What is accountability?

3. What information may be required from community leaders?

4. Provide an example of a type of format that may be required for reporting.

Click to complete Practice task 8

Summary

1. As a community services worker, you need to be able to identify the interests and concerns of those you represent, and be able to prioritise these.

2. Developing a framework to promote the interests of those represented makes the process more effective.

3. Respond to opportunities to promote the interests of those you represent, as they arise as part of your daily work role.

4. Assess the impact of developments and decisions that occur during the representation process, and respond appropriately.

5. It is important to provide key people with progress reports and feedback regarding the representation process.

6. Accountability is important in the representation process. Reporting can be written, verbal or electronic.

Learning checkpoint 2
Represent the interests of the client or client group

This learning checkpoint allows you to review your skills and knowledge in representing the interests of the client or client group.

1. Why is it necessary to have a basic understanding of legal issues when working with clients and groups?

2. What does power of attorney refer to?

3. Why is it important to always work within your own organisation's priorities and objectives?

4. What are some ways you can develop decision-making skills in your clients?

5. What are some ways to actively seek out and respond to opportunities as a part of your work role?

6. What is an example of how opportunities may arise for influencing policy development?

7. What changes and potential impacts may be seen in community change as a result of representation?

8. Why is celebrating success a valid form of reporting and keeping stakeholders up to date?

9. Give three examples of the type of feedback that key people may require.

10. What are some examples of the different formats for feedback?

Topic 3

In this topic you will learn how to:

3A Communicate and promote purpose and objectives

3B Promote and facilitate collaborative planning and action

3C Identify potential areas of conflict and implement strategies to address them

3D Undertake appropriate work with organising committees and boards of management to maximise effectiveness

Negotiate outcomes and liaise with key people

To increase the effectiveness of the representation service, it is important for community services workers to develop alliances with key individuals, groups and organisations. Working in a collaborative manner increases the skills, knowledge and resources brought to the process. Working collaboratively may present challenges; your role is to identify possible areas of conflict and put in place strategies to address them. You also need to work with committees or boards of management from your own organisation and others. Having these groups involved can increase the effectiveness of the representation process.

3A Communicate and promote purpose and objectives

Having a clearly defined purpose and objectives of the representation helps in focusing on the strategies to use and reduce misunderstandings through misinterpretation. The purpose and set of objectives may change slightly through the process according to availability of resources and the changes that occur as a result of consultation and review of impacts on decisions. For the representation process to be successful, the purpose and objectives need to be made clear to the decision-makers so they can see and understand the issues and concerns and what is hoped to be achieved.

Make sure the purpose and objectives remain the clear focus and are promoted as the main issue. For example, provide all clients periodically with a formal record of the representation actions in a progress report with the objectives and purpose clearly defined in the document. A progress report that communicates to key people the purpose, objectives and work completed so far, could include the following information.

A formal record of the representation may include the following:

▶ The purpose of the representation; for example, to raise awareness of the need for a crèche at the local drop-in centre and obtain funds to run it

▶ Objectives; for example, to obtain the funds to install a crèche at the Hamilton drop-in centre

▶ Participants; for example, Hamilton regional council, childcare services, the parent group and community members

▶ Strategies; for example, media stories, lobbying, public meetings, letterbox leaflet drops and information from networks that have completed similar projects

▶ Time lines; for example, March to May 2016

Communicate for promotion

Communication is vital if the purpose and objectives of the representation are to be promoted to the wider community. Communication strategies will be selected according the needs assessment and resources available and what is suitable for the client.

For communication to be effective, the communicator needs to be clear and the receiver needs to understand the message. When doing a presentation to promote an issue here is some things to consider.

To communicate effectively:

▶ speak clearly

▶ don't speak too fast or slow

▶ project your voice

▶ use appropriate body language and gestures

▶ face the group you are speaking to

▶ write clearly and legibly if using a whiteboard or smart board

▶ have a clear objective or outcome to your communication

▶ check and set up technology before the presentation and test that it runs as required.

Communicate and promote purpose and objectives

Sally is preparing for a public meeting in the local hall to provide an update on the work done so far regarding the issue of poor access and services in the local shopping centre for people with disabilities.

Sally has an idea of how many people will attend and has set up the room ready for her presentation with chairs for the attendees and other speakers, and an area at the front where people can stand to speak.

Sally has prepared a one-page summary of the work she and the key stakeholders have done so far, and at the top she has clearly written the objectives and purpose of the group and what they hope to change/achieve.

Practice task 9

1. What information may be included in a progress report?

2. What are three key things to remember when doing a presentation?

Click to complete Practice task 9

3B Promote and facilitate collaborative planning and action

Collaboration refers to working cooperatively with others to meet identified objectives. Collaborating with key people or other like-minded organisations or groups through an alliance can produce more-effective advocacy and representation services because it strengthens the actions being taken. It also demonstrates to decision-makers and the community that key people and stakeholders recognise the interests and concerns of those being represented. This can make an enormous difference to the representation process.

Collaboration

As discussed in earlier, the representation service may form a formal or informal alliance to collaborate with individuals, groups or organisations that share common goals or client group interests. They may collaborate with others who can bring skills, knowledge and resources to the representation that the individual organisation does not have. You may need to extend your networks and contacts with key people, and collaborating with other organisations can assist in this.

The following explains more about the collaborative process.

Working collaboratively

Many funding bodies look favourably on collaborations and partnerships, so working in a collaborative manner may increase opportunities to access funding. Collaborations can also establish ongoing relationships, which may assist in providing better services for people and setting up support for future representations.

You can work collaboratively during both the planning and action stages of the representation process. Communication is essential when working in a collaborative manner. Everyone needs to be kept informed and involved in every relevant aspect of the representation process.

Establishing roles

During the planning stages, it is important to establish the following roles and responsibilities:

▶ Who does what; for example, who speaks to the media?

▶ Who is responsible for each part of the representation; for example, deciding on strategies and specific actions.

▶ What resources will each member bring to the representation; for example, financial or staffing resources?

Ensuring everyone is clear on their roles and responsibilities in a written agreement may decrease future conflict.

Collaborative relationships

Some examples of collaborations are outlined in the following information. Your role in these situations is to develop the collaborative relationship and support the collaboration through clear communication, negotiated agreements and to work within the boundaries of roles and responsibilities.

Youth service and university students project

Collaboration: a youth service collaborating with multimedia students at the nearby university

Goal: to develop a website and online petition to promote the interests of local young people

AOD and mental health services project

Collaboration: a mental health service collaborating with an alcohol and other drugs service

Goal: to lobby for funding for clients with both mental health and AOD issues

Multicultural/immigration awareness project

Collaboration: a multicultural centre collaborating with local ethnic associations

Goal: to promote a positive community view of immigration and the benefits of multiculturalism

Example

Promote and facilitate collaborative planning and action

A community legal service represents many clients in need of legal support who have alcohol other drugs (AOD) issues. The organisation decides to promote the needs of this client group for additional legal support. Senior workers, led by Samara, realise they lack expertise in the AOD sector, so they approach two AOD support organisations to work collaboratively on this representation.

The three organisations meet and negotiate an agreement that includes who will take on a leadership role in the representation and what the roles of the other organisations will be. They decide on the key people who will be consulted during the planning stages and who will be involved in the consultation. They also agree on sharing resources and who will be responsible for reporting requirements. Finally, they agree on a time frame for the planning and consultation.

Practice task 10

1. Outline the benefits of collaborating with others through an alliance.

2. Provide two examples of what is required when establishing roles during the planning stages of collaboration.

3. Outline your role in developing collaborative relationships.

Click to complete Practice task 10

3C Identify potential areas of conflict and implement strategies to address them

Conflict during the representation or advocacy process may undo any gains being made, lead to the disintegration of an alliance, or may ultimately lead to the failure of the process. Recognising possible areas of conflict at the beginning of the representation process can make an enormous difference by allowing you to put preventative strategies in place to avoid or reduce conflict during the process.

Understand conflict

Conflict is defined as a disagreement or struggle between people with different or opposing needs, ideas, beliefs, values or goals. It may occur when members who are collaborating disagree or have incompatible objectives or values. Conflict may also occur when roles, objectives and strategies are not clearly agreed to, or when the objectives or priorities of one or more of the members change.

Conflict may arise for a number of reasons; for example:

▶ Key people and stakeholders have different agendas, goals or priorities.

▶ Key people and stakeholders have different beliefs, values, cultures, skills or knowledge.

▶ Those represented have different priorities from those representing them.

▶ Some of those represented change their priorities during the process.

▶ Members of the alliance have different values, goals or understanding of the issue.

▶ There may be difficulties with resources; for example, the use of resources, equal contribution or equal participation of those involved.

Identify areas of potential conflict

It is crucial to identify potential areas of conflict before they become an issue, and develop contingencies and strategies to deal with them. You need to identify what areas may raise difficulties in your representation, taking into consideration the people involved, the issues and values present and the resources available. Then, you need to state clear objectives so everyone agrees what the outcome should be. Consider the following.

Address issues

▶ There are often limited resources in community services, and this can lead to conflict as people try to access a share. In this situation, it is useful to address the limited resources early in the representation and agree how these will be distributed. If those participating in the representation have differences in culture, language, age or values, it is also useful to identify these differences to the group and develop an understanding between all individuals.

Positive versus negative conflict

▶ Keep in mind that discussions over issues are healthy, and disagreements are natural when groups of people work together. Conflict, however, can be damaging if it is not addressed promptly. In some cases managing conflict can be relatively easy as those involved are likely to bring any issues up as soon as they arise and resolve them collaboratively. At other times the worker may need to raise the issues and facilitate a resolution.

Use strategies to prevent or resolve conflict

Once a source of conflict has been identified, it is important to resolve the conflict as soon as possible. A community services worker can use a range of strategies, including the following.

Conflict resolution strategies:

▶ Listening: encourage those in conflict to listen to each other's points of view
▶ Respect: ask that participants respect each other's perspectives, even when it is difficult; encourage respectful communication
▶ Assertiveness; discourage insults or put-downs; and demonstrate the use of 'I' statements
▶ Compromise: explore areas of compromise with participants by asking them to think about what is most important to them and what is least important
▶ Time outs; take breaks, if the situation becomes heated, to give everyone the chance to calm down and think
▶ Agreement: agree on how potential conflict will be addressed at the beginning of the representation process

The consultation process

One way to prevent or decrease the likelihood of conflict is to make sure consultation is broad and everyone has an opportunity to have their say. High-level communication skills are needed to make sure everyone is heard and feels as though they have contributed. Many of the members of the group or the individual being represented may feel strongly about the issues and concerns affecting them and may be impatient for results. Making sure that reviews and communications are timely ensure that the process runs smoothly.

Sometimes it may be necessary to consult more widely to fill in information gaps that appear, or to consult with an expert who was not considered necessary at the start of the project. This can be done through different types of consultation such as:

▶ on-on-one interviews

▶ discussion groups and workshops

▶ open days

▶ surveys

▶ web-based consultation on interactive websites

▶ social media communication.

Decision-making made clear

The decision-making process should be clearly communicated so members can see that the decisions made reflect their objectives and goals and are on track to lead to actions that match these. Being able to show a record of the history of decisions made is one of the aims of the reporting and providing feedback. A basic decision-making process model may include the following steps.

The decision-making process
▶ Identify the problem or opportunity.
▶ Gather the information.
▶ Analyse the situation.
▶ Develop options.
▶ Evaluate options and choices.
▶ Select a preferred option.
▶ Take action on the decision.

Negotiate agreement

Depending on the situation, you may find it useful to liaise with others to support them in resolving conflict. Community leaders may be able to address situations or negotiate with members of their community more successfully than you can. If there are language difficulties, it may be necessary to engage interpreters to ensure communication is clear and understood. You may be also supported by a manager or by someone with more expertise.

For successful negotiation, you need sound communication and interpersonal skills.

To resolve conflict, you need to be able to:

▶ practise active listening skills

▶ use communication skills such as clarification and asking open questions to ensure understanding

▶ encourage participation by everyone involved

▶ be aware of nonverbal communication

▶ be assertive when required

▶ encourage participants to work as a team towards a shared objective.

Models of negotiation

Negotiation is a valuable skill that can be used to prevent or resolve conflict. Negotiation done well means that the person or people feel supported and that the outcomes are fair and clear.

The following is a summary of four models of negotiation.

Win–Win

Everyone in the negotiation wins (gets what they want).

This is the ideal model as everyone benefits and no-one loses in this model.

Win–Lose

You win, the other party loses.

After negotiation, one party wins, while the other party loses; that is, one party benefits while the other is dissatisfied.

Lose–Win

You lose, the other person wins.

After negotiation, one party wins, while the other party loses; that is, one party benefits while the other is dissatisfied.

Lose–Lose

The outcome of this negotiation is that everyone leaves dissatisfied.

Neither party accepts the other's perspective or is prepared to compromise.

Aim for a win–win outcome

You should be working towards a win–win negotiation outcome. For example, in a situation where regional and metropolitan services disagree about the allocation of funding, a win–win would be both parties leaving the negotiation with a share of the funding they feel is fair. They would also leave feeling they have been heard and have had their position and concerns validated.

The RADPAC model

The RADPAC model (Rapport, Analysis, Debate, Purpose, Agreement, Close) is another commonly used negotiation model. You can use this process to work through a conflict or potential conflict, as described below using example of regional and metropolitan services disagreeing about the allocation of funding.

Rapport

A comfortable working relationship between the parties is developed.

The services know each other from networks and conferences, but have not worked closely together. You need to provide opportunities for relationships to be developed. This may be by having a relaxed networking session at the beginning of the process with food and drinks provided.

Analysis

The parties understand each other's interests and needs.

Relationships also develop when parties begin to understand each other, so providing opportunities for the regional and metropolitan organisations to explain their interests and concerns to each other may lead to a mutual understanding.

Debate

Parties discuss issues, pros and cons, and attempt to convince the other of their view.

Encourage debate over the funding issues by having both regional and metropolitan organisations argue why they should receive the funding they are seeking.

Propose

Each party proposes their best idea.

Have each party propose their best argument for why they should receive the funding. Make sure you allow the same amount of time for each party to present their arguments.

Agreement

The parties come to a conclusion and agree on the best alternative.

Negotiate with the parties until they reach a decision on how to best share the funding. Have them consider each other's position, their needs and interests.

Close

The negotiation is completed.

Close the negotiation by encouraging continuing conversation and networking. You may need to confirm the agreement or arrangements in writing, ensuring each party has a copy of the details.

Example

Identify potential areas of conflict and implement strategies to address them

A group of disability services may agree on the need for increased funding for respite services; however, conflict has arisen when prioritising where the additional funding should go. Those working in regional services may feel they should receive more funding as they have fewer current services; whereas those working in metropolitan services may feel they should receive more as they have a larger client population to provide services for.

Freya, who is leading this representation, needs to ensure everyone involved understands that the purpose and objective of the representation is to increase funding for all organisations present. Freya must then explain that the objective of the negotiation is to ensure both regional and metropolitan organisations are given to opportunity to be heard and have their issues understood. Once this has occurred, the next objective is to agree on how funding will be distributed in a manner that is acceptable for everyone present.

Practice task 11

1. Give two examples of when conflict may occur during representation.

2. Outline the positive and negative aspects of conflict.

3. List three elements of a conflict resolution strategy.

4. What are two popular models of negotiation?

5. Explain the steps in the RADPAC model of negotiation.

Click to complete Practice task 11

3D Undertake appropriate work with organising committees and boards of management to maximise effectiveness

Community services workers who are representing individuals, groups or industry may need to work with committees or boards of management from time to time. These may be within their own organisations or as part of consultation or collaboration processes such as with an industry group.

When working with committees or boards, you need well-developed communication, negotiation and management skills. These skills will enable you to do the following.

Communication, negotiation and management skills
▶ Establish a professional working relationship
▶ Effectively present the purpose and objectives of the representation to gain support
▶ Liaise during the representation period
▶ Resolve any conflict that may arise during the representation
▶ Provide or receive regular progress reports
▶ Address their feedback

Organising committees

An organising committee is a group whose role is to assist the progress of the representation service or agreed actions that are part of the process. Consider the following example.

The committee's role
One of the representation strategies agreed to may be a march through the city followed by a rally outside Parliament House. The representation alliance may form a committee to take on the role of organising the march and reporting back to the main group on progress. The organising committee would be responsible for legislation requirements (for example, any permits needed), the route of the march, promotional materials, contacting the media, invitations to decision-makers, practicalities (for example, water, sunscreen, placards and banners), and reporting proposals (for example, photos and video).

Your role
Your role may be working directly with the organising committee as a member, or checking with them regularly to assess the need for support. You may need to encourage action, play a supportive role or only need to ask for progress reports. You need communication, negotiation and management skills to facilitate the organising committee and communicate effectively with them. Part of your job may be to ensure the organising committee comprises a mix of individuals involved in the representation process so all views are represented to avoid potential conflict.

Boards of management

A board of management is a body of elected or appointed members who work together to oversee an organisation's activities and are responsible for its overall management. While board members are rarely involved in the day-to-day work, they are often involved in approving projects or representation services, or speaking to the media.

Your role may be to interact with your own board of management or the boards of key organisations or collaboration members. The following explores the roles of boards and a worker's role in working with them.

The Board's role

The board of management's role in a representation process may be to:

▶ approve all or aspects of the representation service (for example, budgets or press releases)

▶ enter into collaboration agreements

▶ approve reports to funding bodies and stakeholders.

For example, a worker may approach board members from another organisation with a proposal for a collaborative representation promoting the interests of their mutual client group. The board may discuss this and work on a collaborative agreement.

Your role

You may need to work with boards to:

▶ gain authorisation to proceed with a representation service

▶ ask for support for the representation

▶ propose a collaborative relationship

▶ gain permission to speak to the media or have a board representative speak to the media to promote the representation

▶ report on progress or the outcomes of the representation service.

Required skills

To be effective working with boards of management, you need to understand how boards work and the roles of those on a board. You need to have skills in:

▶ communication and presentation, including the ability to clearly propose actions, ask for assistance, and explain the representation process and strategies

▶ consultation

▶ planning

▶ report writing and feedback.

Example

Undertake appropriate work with organising committees and boards of management

Janet, a community services worker, is asked by her manager to attend a board meeting to explain the progress of a representation. Janet has been given five minutes to present and five minutes to respond to questions from board members. She prepares a one-page progress report to give to the board and prepares an electronic presentation summarising the report and explaining future actions.

Practice task 12

1. What are organising committees and what are they responsible for?

2. Outline two examples of the representation responsibilities of a board of management.

3. List two examples of what your role may involve in relation to working with a board of management.

Click to complete Practice task 12

Summary

1. It is important to identify individuals, communities and organisations that can support the representation, and develop effective alliances with them.

2. Collaborating with key people or with other like-minded organisations or groups through an alliance can strengthen the actions being taken. It demonstrates to decision-makers and the community that key people and stakeholders recognise the interests and concerns of those being represented. This can make an enormous difference to the representation process.

3. Identifying potential areas of conflict and putting in place strategies to prevent or mediate this conflict is an essential part of the representation process.

4. Conflict may occur if key people and stakeholders have different agendas, goals, priorities, beliefs, values, cultures, skills or knowledge; have different opinions about resource allocation; if priorities are changed during the process; or if they have differing perspectives about the strategies chosen.

5. Listening, being respectful, compromising and having time to reflect are all strategies to resolve conflict.

6. You must clearly define and promote the objectives and desired outcomes of the representation service so everyone concerned is clear about the purpose and goals of the representation.

7. You need to work collaboratively and effectively with committees and boards of management as part of the representation process.

Learning checkpoint 3
Negotiate outcomes and liaise with key people

This learning checkpoint allows you to review your skills and knowledge in negotiating outcomes and liaising with key people.

Part A

1. Why is it important to communicate a clear and precise purpose and set of objectives?

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2. What does the RADPAC model of negotiation involve?

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Part B

Read the case study, then answer the questions that follow.

Case study

Marina is the coordinator of a small community centre. Among the programs the centre provides are limited recreation services for retired people. The people who attend these have indicated that they would like additional opportunities at the centre, but there are no resources to provide these. Marina decides to promote the interests of these seniors who attend the centre to increase services. She realises that, as the only paid worker at the centre, she does not have the resources to represent their interests effectively. She decides she needs alliances to support these clients. Marina gains permission from the board of management to find other organisations in the local area that provide aged care services. She identifies two, including the local council. During her consultation with clients who access the centre, she also learns about an advocacy service for older people. Marina approaches the council and the advocacy service to discuss how they can collaborate to improve services for clients. They meet over several months to ratify objectives, identify the decision-makers and the actions that will take.

Ultimately, an agreement is developed between the local council, the community centre, the advocacy group and one other aged care service whose clients attend the centre.

1. What evidence is there that Marina promotes and collaborates in her planning and action?

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2. Identify any potential area of conflict and suggest strategies to address this.

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3. What advice would you give Marina to maximise the effectiveness of her work with the board of management?

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Topic 4

In this topic you will learn how to:

4A Analyse actual work outcomes and document and report against agreed objectives and priorities

4B Implement adjustments to strategy according to the evaluation

Evaluate the effectiveness of strategies

Evaluating representation and advocacy strategies is important to identify areas for improvement and ensure effective representation services in the future. It also provides community services workers with opportunities to develop their representation skills. Community services workers may also be required to report against agreed objectives and outcomes to alliance members, management boards or funding bodies.

4A Analyse actual work outcomes and document and report against agreed objectives and priorities

An essential part of providing a representation service is assessing how effective the strategies and actions have been. You need to understand what worked, what did not work and the impact the representation has had.

One way you or a representation service can know how effective a representation has been is to analyse the achieved outcomes of a strategy against the objectives agreed by stakeholders in the planning stages. This information can be used to justify future actions, celebrate successes, learn from mistakes, ensure resources are used effectively and report to key people about the representation process.

Analyse the outcomes

An outcome is a result from an action taken. To determine outcomes, the first step is measurement. You need to decide how you will do this. There are a variety of strategies that can be used, depending on the objectives of the representation.

Strategies include:

- ▶ surveys or questionnaires completed by stakeholders, clients or alliance members providing feedback on their satisfaction or indicators of change
- ▶ data collection; for example, how many people attended the rally or march or how many signatures were collected on the petition
- ▶ indicators that objectives have been met; for example, funding was increased by 20 per cent or a new service was created to meet the identified need
- ▶ interviews/focus groups with stakeholders regarding the impact of the representation.

Agree on meeting objectives and priorities

Objectives agreed to at the beginning of the representation need to be clear, specific and measurable to ensure the outcomes can be analysed. You need to decide through consultation with key people what evidence is required to confirm that objectives have been met. The priorities were set during the representation process and can now be reviewed in terms of time lines and actions achieved. Here are some examples of agreed objectives and the analysed outcomes.

Project 1

Objective: To request and receive funding from local government for an Aboriginal and Torres Strait Islander disability project

Outcome: Funding for an Aboriginal and Torres Strait Islander disability project is approved by the local government

Evidence: A signed funding contract is received from the local government for the disability project

Project 2

Objective: To provide advocacy support to a client who believes they do not have access to quality care as they cannot eat the meals provided

Outcome: The client is provided with culturally acceptable food

Evidence: The residential care unit changes the meals for the client and this is noted in the client's file and care plan

Project 3

Objective: To promote the local community centre services and raise the profile of the centre

Outcome: The community centre appears in a local newspaper story; more community members know about the centre

Evidence: There is a 15 per cent increase in centre attendance; a phone survey of the community indicates 80 per cent of the community have heard of the centre

Project 4

Objective: To promote the issue of family violence in the broader community

Outcome: A successful march through the city is completed; the march is promoted and covered by newspapers, radio and television

Evidence: 5000 people attend the march; there are three media stories regarding the march

Report against agreed outcomes

You need to report the results of the representation to the appropriate people and bodies, regardless of whether the outcomes and priorities achieved match or do not match the agreed objectives and the intended outcomes.

Here is how to document and report outcomes.

Document outcomes

When documenting outcomes, consider client confidentiality, privacy and organisational policies and procedures. Recording can occur using:

▶ electronic databases or spreadsheets

▶ report proformas

▶ video or audio recordings or photography

▶ tables or charts.

How you choose to document the outcomes depend on the resources you have available and the outcomes you have measured. Find out whether your organisation or the funding body has a template you should use for reporting.

Report outcomes and priorities

The outcomes analysis needs to be reported to stakeholders. You may be required to report to funding bodies and boards of management, key people who have supported the representation or to people/clients affected by the outcomes. This reporting is part of the accountability process that is essential in representation services and allows all who have participated and supported the representation service to celebrate successes, identify mistakes and propose improvements for future representations. Not reporting may, in some cases, lead to a loss of funding, and not being accountable to stakeholders may lead to a loss of credibility for both the worker and organisation.

Report formats

Tailor the report to the audience and outcomes being discussed. For example, you may use:

▶ a combination of music and video recorded during actions to report to a group of young people who are clients of an organisation

▶ a formal written report for a board of management or funding body

▶ graphics such as charts to describe outcomes based on numbers; for example, to demonstrate what percentage of participants were Aboriginal or from CALD backgrounds

▶ a verbal report to a large group of stakeholders and key people.

Analyse the strategies used

The final step is to analyse whether or not the success or failure of outcomes was related to the specific strategies used during the representation process. The following explains how to evaluate the effectiveness of strategies, alliances and the consultation.

Strategies

▶ You need to evaluate whether the strategies agreed to were effective or whether different strategies may have had better outcomes. This means looking at the framework used, and specific strategies within that framework, and evaluating the effectiveness of these. For example, an online petition targeting senior citizens may be less effective than a face-to-face petition set up in shopping centres or libraries. Directly lobbying decision-makers may have been more effective in increasing funding for an organisation than time-consuming petitions.

Alliances

▶ The alliances that were developed during the representation need to be evaluated. Review the usefulness of each alliance and decide whether or not the alliance increased the effectiveness of the representation. For example, did you approach the best individuals and organisations for an alliance? Consider your own communication and negotiation skills. Is there anything you can do to improve them for future representations? For example, perhaps improved negotiation skills would lead to a more effective agreement regarding objectives.

Consultation

You also need to evaluate the effectiveness of the consultation process used through the representation:

▶ Were important key people consulted?

▶ Should additional people have been consulted?

▶ Was too broad a selection of people consulted?

▶ Was the consultation process effective?

▶ How could it have been more effective?

▶ What methods worked best?

▶ Should you have had clearer objectives for the consultation?

Example

Analyse actual work outcomes and document and report against agreed objectives and priorities

A carers' organisation represents young carers with two objectives:

▶ to raise community awareness of the issues facing young carers

▶ to attract funding to provide respite services to young carers.

Here is how they evaluated the representation.

Representation objectives

Janice, a community services worker, organises a media campaign that involves young carers' stories being told on television, radio and in newspapers. This includes young carers appearing on talk shows and making videos to post on Facebook sharing experiences. Janice also sets up meetings with decision-makers to lobby for funding following the media campaign.

After the agreed representation service is completed, Janice evaluates it by analysing the outcomes.

Outcomes and evidence

Janice records the outcomes, which include:

▶ four stories in the media and three radio/television interviews

▶ an increase of 300 people 'liking' the organisation's Facebook page

▶ much discussion on local talkback radio.

The decision-makers agree to put young carers' needs on the agenda. However, there has been no commitment to funding. This will be the focus of future representation processes.

Practice task 13

1. Why analyse the outcomes of a representation against its intended objectives?

2. What is an example of a strategy that could be used to measure outcomes of the representation process?

3. Provide two examples of formats for reporting.

4. Describe what analysing the effectiveness of an alliance would involve.

Click to complete Practice task 13

4B Implement adjustments to strategy according to the evaluation

Once the outcomes have been analysed against the representation's objectives, use the evaluation results and your own self-reflection to adjust strategies for future representations. This becomes part of the organisation's continuous improvement process. Even in successful representations, there may be the opportunity to fine tune the process, making more efficient use of time and resources for future actions.

Adjustment to strategies

The following provides some examples of areas of the representation process that can be reviewed, evaluated and adjusted. The table identifies ineffective, inefficient or inadequate strategies and suggestions for improvements in future representations.

Inadequate consultation

Situation: Inadequate consultation led to less support than expected by key people as they did not feel part of the process.

Improvement: Identify all key people and consult regarding role, conditions and support at the beginning of the representation.

Ineffective communication

Situation: Analysis indicates that young stakeholders were not reading contact emails so were not as involved as they could have been.

Improvement: Consider SMSs and social media to communicate with young stakeholders; consult with them to assess success.

Lack of agreement

Situation: Limited negotiation skills on the part of the community services worker led to some parties not agreeing to the representation action.

Improvement: Have the community services worker complete training in negotiation to improve skills.

Inability to deal with conflict

Situation: Effectiveness was decreased by conflict between alliance members over objectives of the representation process.

Improvement: Have the community services worker complete training in conflict resolution. Put conflict management strategies in place during the planning stages of representation service.

Ineffective action strategy

Situation: A march that is organised as part of representation service does not attract many participants.

Improvement: Promote the representation action more effectively (for example, in the media, to other organisations, to key people and stakeholders) or consider a more effective strategy.

Inappropriate reporting format

Situation: The community services worker prepared a formal written report for stakeholders but some of these people had literacy issues.

Improvement: Prepare a verbal or visual (video, photographic) presentation to report to stakeholders in addition to the written report.

Implement the improvements

Suggestions on how to improve the representation service are often made as part of the reporting process. Alternatively, you may receive information during feedback sessions with key people and stakeholders after the representation service. Understanding that changes are required needs to be followed up by taking action to implement the suggested improvements.

Representation can be improved by:

▶ adjusting strategies in future actions by using more effective or resource-efficient strategies or adjusting individual strategies

▶ using different or more appropriate strategies, like more direct action such as marches, if lobbying has not worked

▶ adding or removing individuals, groups or organisations to and from the alliance to increase effectiveness

▶ consulting with additional or different key people

▶ changing the reporting or accountability process by having fewer or more progress reports, changing format or reporting to different stakeholders.

Example

Implement adjustments to strategy according to the evaluation

Michaela, who is leading a representation for her organisation, decides to meet with decision-makers to promote the interests of the clients her organisation is representing. While analysing the outcomes, she realises that, while her team did meet with the identified decision-makers, fewer than half of the objectives of the representation were met.

She reflects on what went wrong and suggests a change be made to the strategic framework to implement a more direct action model. This will ensure issues are promoted to the broader community, not just specific decision-makers, in order to generate community support before meeting with decision-makers. Michaela also decides to approach other relevant organisations to form an alliance to increase the influence of the representation action.

Practice task 14

1. How can results from an evaluation be useful going forward?

2. Identify the areas of a representation process that can be reviewed and evaluated.

3. Provide an example of how an organisation may implement improvements.

Click to complete Practice task 14

Summary

1. It is important to analyse the outcomes of the representation service against the agreed objectives and evaluate the effectiveness of the specific representation strategies used.

2. Improvements and adjustments to strategies need to be identified to increase the effectiveness of future representation services.

3. The outcomes and suggestions for improvements need to be reported to key people and stakeholders as part of the accountability process.

4. Once improvements to representation strategies have been suggested, the organisation's key people need to implement the changes or improvements.

Learning checkpoint 4
Evaluate the effectiveness of strategies

This learning checkpoint allows you to review your skills and knowledge in evaluating the effectiveness of strategies.

Read the scenario, then answer the questions that follow.

Scenario

Western Care provides services to the local community, including home and community care and youth services. Maya, a community services worker at Western Care, facilitates a program for mothers under the age of 21. She discusses with you her concerns regarding these young mothers and their children. While most of the mothers try hard to parent effectively, Maya is concerned that many do not seem to understand the basic nutritional needs of young children and struggle with handling their children's handling behaviours of concern, such as tantrums.

You talk to the young mothers about these concerns and they tell you they want to improve their skills and knowledge, but don't know where to get assistance. You believe a representation service may be able to increase awareness of young parents and their concerns, provide avenues to help educate the young women to access appropriate services and provide funding for specific training courses.

The objectives of the program are as follows:

▶ To increase awareness of young parents and their concerns

▶ To provide avenues to help educate the young women to access appropriate services

▶ For young people to participate in representation services

▶ To achieve an increase in funding for an educational program for young parents

▶ To implement a new program to meet identified concerns

The representation service's chosen strategy was a paper-based petition. Unfortunately, the petition does not get the expected number of signatures as limited young people approached the petition table that was located at the local shopping centre.

1. List the objectives of the program and provide an example of evidence to show how each objective may have been met.

2. Suggest an adjustment that could be made to the strategy of using a petition to raise awareness of the issue.