



# CHCADV002

Provide advocacy  
and representation  
services



# **CHCADV002**

## **Provide advocacy and representation services**

**Release 1**

**Learner Guide**

Aspire Version 1.1

## CHCADV002 Provide advocacy and representation services, Release 1

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PO Box 5107, Bentleigh East, VIC 3165 Australia  
Phone: (03) 9820 1300

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Aspire acknowledges the homelands of all Aboriginal and Torres Strait Islander peoples and pays our respect to Country



# 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.

## 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.

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	These 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.	
Callouts	Callouts reiterate key learning points to help students revise for their assessments.	
Weblinks	Weblinks provide learners with additional content to contextualise their learning and develop their understanding.	
Videos	Videos provide a visual reference of key concepts to aid comprehension and guide learner exploration. Each video is accessed by a QR code in the Learner Guide (or a button in the eBook version) for ease of access.	 
Glossary/margin definitions	Key terms are defined where they first appear to help consolidate understanding. A glossary of terms is provided at the end of the Learner Guide to assist learner revision of key concepts.	
Summaries	Key learning points are provided at the end of each topic.	
Learning Checkpoints	There are Learning Checkpoints at the end of each topic. Your trainer will tell you which activities to complete. These activities give you an opportunity to check your progress and apply the skills and knowledge you have learnt.	
Case studies	Case studies are interspersed throughout the learning content to provide a workplace setting that contextualises key concepts.	



## 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.

These skills are listed below:

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> <li>• Understanding how documents are presented and being able to navigate through documents</li> <li>• Understanding industry- and job-specific terminology</li> <li>• Interpreting key information in relevant documents</li> <li>• Understanding routine workplace checklists and documentation</li> </ul>
Writing	<ul style="list-style-type: none"> <li>• Planning, drafting and writing reports and documents</li> <li>• Communicating through written letters, email and online</li> <li>• Recording progress; reporting incidents</li> </ul>
Oral communication	<ul style="list-style-type: none"> <li>• Clarifying instructions</li> <li>• Providing information</li> <li>• Supporting others through encouragement, negotiation and conflict resolution</li> <li>• Using body language to model desired behaviour and responding to others' body language</li> </ul>
Numeracy	<ul style="list-style-type: none"> <li>• Calculating costs, weights, measurements of height and distance</li> <li>• Interpreting measurements</li> </ul>
Learning	<ul style="list-style-type: none"> <li>• Understanding your job role, organisational procedures and legal responsibilities</li> <li>• Managing your work and seeing how well you are going</li> <li>• Making goals for yourself at work</li> <li>• Seeking professional development opportunities for continuous improvement</li> </ul>
Problem-solving	<ul style="list-style-type: none"> <li>• Identifying problems</li> <li>• Working out how to fix a problem using problem-solving processes</li> <li>• Reviewing the outcome</li> </ul>
Initiative and enterprise	<ul style="list-style-type: none"> <li>• Recognising opportunities to develop and apply new ideas</li> <li>• Generating ideas by thinking of new ways to do something</li> <li>• Making suggestions to improve work</li> </ul>
Teamwork	<ul style="list-style-type: none"> <li>• Working well with other people by cooperating, collaborating, encouraging and building rapport</li> </ul>



Foundation skill area	Foundation skill description
Planning and organising	<ul style="list-style-type: none"> <li>• Planning your workload and commitments</li> <li>• Implementing tasks</li> <li>• Completing work on time</li> <li>• Knowing how to deal with hazards and risks</li> </ul>
Self-management	<ul style="list-style-type: none"> <li>• Understanding and applying decision-making processes</li> <li>• Reviewing your behaviour and the impact of your decisions</li> </ul>
Technology	<ul style="list-style-type: none"> <li>• Efficiently using digitally based technologies and systems correctly and safely</li> <li>• Accessing, organising and presenting information</li> <li>• Using equipment correctly and safely</li> </ul>

Note: Not every unit of competency will contain all foundation skills.

## 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 outcome	Rate your confidence in each section
Topic 1 Establish the representative role and process	1A Identify role, processes and conditions of representation	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Identify and seek the support of key people, and develop strategic alliances	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Determine and implement requirements for reporting, accountability and evaluation	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2 Represent the interests of the client or client group	2A Identify relevant interests and concerns	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Contribute to developing a framework for promoting people's interests	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Create and respond to opportunities to present and promote people's interests	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2D Determine the impact that developments and decisions will have on objectives and priorities and how to measure success	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



Topic	Key outcome	Rate your confidence in each section
Topic 2 Represent the interests of the client or client group	2E Provide progress and other reports and feedback to key people	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3 Negotiate outcomes and liaise with key people	3A Communicate and promote purpose and objectives	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Promote and facilitate collaborative planning and action	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Identify potential areas of conflict and implement strategies to address them	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3D Work with organising committees and boards of management to maximise effectiveness	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 4 Evaluate the effectiveness of strategies	4A Analyse actual work outcomes and document and report against agreed objectives and priorities	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4B Implement adjustments to strategy according to evaluation	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident







## Topic 1: Establish the representative role and process

- 1A Identify role, processes and conditions of representation
- 1B Identify and seek the support of key people, and develop strategic alliances
- 1C Determine and implement requirements for reporting, accountability and evaluation



# 1A

## Identify role, processes and conditions of representation

### **Formal representation services involve presenting and promoting the views, rights and needs of the person or group.**

#### **Advocate**

An individual who speaks up for a person to defend their rights.

A worker who provides representation services is an **advocate** for the person or group they are representing.

Representation services are required for a range of reasons. For example, it may not be possible for a person to promote their own rights and needs because they have a disability or condition that prevents them from doing so. A community might require representation services because they are disempowered or struggling to be heard.

As someone who provides representation services you might also be representing the interests of an industry or sector. For example, you might be advocating for increased funding for organisations that provide support to young homeless people.

Therefore, when you provide formal representation services you will either be representing an individual or a group of people.

<b>Individual advocacy</b>	<p>Individual advocacy focuses on the views, rights, interests and needs of a single person. When you provide advocacy to a single person you work directly with them.</p> <p>You might also work with other key involved people to gain a better understanding of the person's views, rights, interests and needs. This may be family members, friends and case workers.</p> <p>Some situations where individual advocacy may be required include when:</p> <ul style="list-style-type: none"><li>• a child, teenager or vulnerable person is at risk of abuse, neglect or exploitation</li><li>• a person is not receiving what they need from a service</li><li>• a young person in youth detention needs someone to ensure they are being treated fairly and receiving an appropriate level of care.</li></ul>
<b>Group advocacy</b>	<p>Group advocacy focuses on the views, rights, interests and needs of a group of people and is useful when a group of people are facing similar issues that need to be addressed.</p> <p>When you provide advocacy to a group of people, you engage in consultation to understand the group's views, rights, interests and needs. You might also work with people who have deep connections with that group, such as community leaders.</p> <p>Some situations where group advocacy may be required include when:</p> <ul style="list-style-type: none"><li>• a community is tackling issues that impact their health and wellbeing</li><li>• a group of people with a shared goal want to bring about change</li><li>• a group of agencies want to draw attention to an issue which is overlooked or misunderstood.</li></ul>



Sources: <https://nbacl.nb.ca/module-pages/other-types-of-advocacy-group-advocacy-and-self-advocacy/>  
<https://www.daru.org.au/what-is-advocacy/definitions>

## What advocacy work involves

The personal skills you need to undertake advocacy work include the ability to actively listen to what others have to say, examine a range of options, make informed decisions and demonstrate respect, fairness and integrity.

There are numerous components involved in providing representation services, including the following:

To advocate for others, you need strong organisational, leadership and communication skills.

<b>Raising awareness</b>	<p>Raising awareness of an issue is one of the most important functions of advocacy.</p> <p>When people are not aware of, or don't understand, the challenges a person or group of people are facing, they are unlikely to take action to rectify those issues.</p>
<b>Working alongside people to make decisions</b>	<p>The role of the representation service is to decide, in consultation with those they represent, what actions to take.</p> <p>A crucial underpinning principle of representation and advocacy services is that they do not make decisions on behalf of the people they represent. Rather, they work with them to promote their interests.</p>
<b>Developing people's decision-making skills</b>	<p>When you provide representative services you can help people develop their own decision-making skills. By supporting someone to learn and practise decision-making, you can help them to become advocates for themselves.</p>
<b>Representing interests through written communication</b>	<p>You may be required to write reports or submissions as part of your role.</p> <p>For example, to promote the interests of a particular group of clients you might need to write a submission for a parliamentary inquiry.</p>
<b>Identifying key people</b>	<p>In order to bring about changes you are advocating for on behalf of the people you are representing, it is critical to identify the people who have the power to effect change.</p> <p>These might include policymakers, community leaders, business people, government representatives and academic experts.</p>
<b>Consulting with others</b>	<p>Consulting with others is a key aspect of advocacy.</p> <p>Consultation will help you develop:</p> <ul style="list-style-type: none"> <li>• a clear picture of the needs, issues and concerns of the individuals or groups being represented</li> <li>• an understanding of the requirements and expectations of government, politicians and decision-makers</li> <li>• working relationships and strategic alliances.</li> </ul>



<p><b>Influencing decision-making</b></p>	<p>You may need to take action to influence decision-making processes when:</p> <ul style="list-style-type: none"> <li>• there are identified gaps in provided services; for example, insufficient support for carers</li> <li>• there are proposed changes to legislation or services; for example, changes to Centrelink benefits for sole parents</li> <li>• individuals or groups are being treated unjustly; for example, tenants being evicted without due cause</li> <li>• you need to draw attention to an issue/group; for example, young people with high-care needs living in aged care facilities.</li> </ul>
<p><b>Taking action</b></p>	<p>This means taking action to directly promote the views, rights or needs of the person or people you are advocating for.</p> <p>For example, this might involve:</p> <ul style="list-style-type: none"> <li>• providing feedback to decision-makers on changes to legislation that may impact those you represent</li> <li>• initiating a social media campaign to raise awareness of an issue</li> <li>• lobbying politicians and government department representatives</li> <li>• speaking at a public forum about the needs of a group of people.</li> </ul>

Different types of advocacy are discussed here:

<p><b>Self</b></p>	<ul style="list-style-type: none"> <li>• Self advocacy is advocating for yourself.</li> <li>• A person who can advocate for themselves is able to effectively communicate, fight for and defend their interests, needs and rights.</li> </ul>
<p><b>Individual</b></p>	<ul style="list-style-type: none"> <li>• Individual advocacy is advocating for a single person.</li> <li>• Individual advocacy is either formal or informal.</li> <li>• When someone advocates for another person informally, there is no standard process or agreement; for example, a parent advocating for their child.</li> <li>• Formal representation, in contrast, involves a person who is employed by an organisation to provide representation services according to established and agreed processes.</li> </ul>
<p><b>Systems</b></p>	<ul style="list-style-type: none"> <li>• Systems advocacy aims to change laws, policies or rules that have an impact on people’s lives.</li> <li>• Systems advocacy could target an organisation, a sector or government (local, state or federal).</li> </ul>
<p><b>Citizen</b></p>	<ul style="list-style-type: none"> <li>• Citizen advocacy involves a member of the community who volunteers to advocate for a person.</li> <li>• The citizen advocate forms a relationship with the person they are representing and supports them to voice their needs and concerns.</li> </ul>



<b>Parent</b>	<ul style="list-style-type: none"> <li>• Parent advocacy involves supporting parents to deal with issues relating to their children; for example, issues involving their child's education.</li> </ul>
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Source: <https://cedwvu.org/resources/types-of-advocacy>  
<https://www.dana.org.au/how-to-advocate/>  
<https://www.parentsvictoria.asn.au/about-us/what-we-do>

## Nature of community services and the health sector

It is important to understand the diverse range of services that are provided by the health and community services systems. An understanding of both these systems will help you to represent the varying needs and interests of individuals and communities.

<b>Diversity</b>	<p>You should be familiar with the wide range of services that operate in the health and community services sector and the work they do.</p> <p>In community services these include:</p> <ul style="list-style-type: none"> <li>• aged care services</li> <li>• disability services</li> <li>• youth work services</li> <li>• housing services</li> <li>• alcohol and other drugs services</li> <li>• family and domestic violence services.</li> </ul> <p>In the health sector these include:</p> <ul style="list-style-type: none"> <li>• primary health care; for example, GPs</li> <li>• specialist services; for example, endocrinology, oncology</li> <li>• hospitals.</li> </ul> <p>Some agencies provide both community and health sector services. For example, an alcohol and drug service might provide rehabilitation services in a hospital setting as well as supported accommodation.</p>
<b>Principles</b>	<p>The principles underpinning community services and the health sector are informed by basic human rights, such as the right to an adequate standard of living, education and health and the right to be free from discrimination and abuse.</p> <p>The community services system has a collaborative and holistic approach to service provision. Service providers are encouraged to work in a way that recognises and respects individual goals and choices. Examples of principles related to service delivery to clients include:</p> <ul style="list-style-type: none"> <li>• <b>person-centred approach</b></li> <li>• <b>strengths-based approach</b></li> <li>• <b>duty of care.</b></li> </ul>

**Person-centred approach**  
 Providing tailored support for each person and taking time to learn about their individual preferences, needs and goals.

**Strengths-based approach**  
 Recognises that all individuals are resourceful and resilient experts in their lives, and can progress in a way that enhances their quality of life.

**Duty of care**  
 A moral or legal obligation to ensure the safety and wellbeing of other persons.



<b>Issues</b>	<p>Different groups within the community face different challenges and issues. For example, you may be representing:</p> <ul style="list-style-type: none"> <li>• clients with mental health issues who are disadvantaged by a specific government policy</li> <li>• older people who cannot access adequate home-based care</li> <li>• tenants who have been unfairly evicted</li> <li>• single mothers who have had their welfare payments cut</li> <li>• parents or carers of people with disability whose needs are not being fully recognised.</li> </ul>
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## Structure of health and community services systems

Here are some of the fundamental structural features of Australia’s health and community services systems:

Health services	
<b>Funding</b>	<p>All levels of government (Commonwealth, state/territory, local) are involved in funding Australia’s health system.</p> <p>Other stakeholders who fund the health system include:</p> <ul style="list-style-type: none"> <li>• non-government organisations</li> <li>• private health insurers</li> <li>• individuals who pay for products and services.</li> </ul>
<b>Responsibility</b>	<p>All levels of government (Commonwealth, state/territory, local) share responsibility for Australia’s health care system.</p> <p>Some health services are operated by private sector organisations.</p>
<b>Stakeholders</b>	<ul style="list-style-type: none"> <li>• Individuals, such as patients or clients, use health services to meet their healthcare needs.</li> <li>• Government health departments are involved in planning and developing policies.</li> <li>• Private health insurers provide people with options to manage their healthcare expenses.</li> <li>• Consumer and advocacy groups protect the interests of individuals who use health services.</li> <li>• Not-for-profit organisations support health services and consumers by, for example, raising awareness of health issues and fundraising for research.</li> </ul>
Community services	
<b>Funding</b>	<p>Community services are funded by government (Commonwealth, state/territory, local) as well by philanthropic organisations, trusts, grants and charitable donations.</p>



Community services	
Responsibility	The community services sector comprises government and non-government services responsible for meeting a range of diverse needs including aged care and disability support.
Stakeholders	<ul style="list-style-type: none"> <li>• Individuals who use community services</li> <li>• Government departments that plan and deliver services</li> <li>• Consumer and advocacy groups that protect the interests of people who use community services</li> <li>• Not-for-profit organisations that plan and deliver community services and that support services through awareness-raising and fundraising efforts</li> </ul>

## Identify role and processes

The boundaries of your work role will require you to work within your organisation's policies and procedures and seek assistance or supervision as needed. Your job description will outline the parameters of the role, but working as a part of a team always means consulting and sharing information with others and asking for advice when required.

The processes involved in representation will differ depending on who is being represented and to whom a representation is being made. The following steps are common to most representation processes:

Consult those being represented and ensure they have control over decisions that are made – if that is what they want.

Identify the role/s 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.

Be aware of the processes involved in making representations to government departments, members of parliament, peak bodies and industry groups. You must also follow your own organisation's processes, policies and procedures. For example, your organisation may have specific processes for approaching decision-makers or for getting approval to form collaborative relationships.



## 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. It is also important to ensure the action follows legislative and regulatory standards.

## Cultural factors

As someone who provides representative services, it is essential you are aware of cultural factors. Cultural factors you may need to consider include:

- language: do you need an interpreter when consulting with members of a particular community?
- communication: are you aware of differences in non-verbal communication between cultural groups?
- values and beliefs: are there expectations around gender and spiritual practices that you need to be aware of?

## 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 clearly outline the roles of participants, the purpose, outcomes and expectations.

## Existing structures, systems, networks and processes

It can save you time and energy if you identify existing structures and networks and understand processes and systems within the community. Existing community structures may be:

- governmental
- industry based
- community based.

Processes and systems may include procedural processes such as meeting with ministerial staff before meeting 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 be of help when facilitating change in the community.

## Requirements of industry

Each industry has a set of mechanisms, each with its own requirements. Some of these requirements include:

<b>Committees</b>	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 of Aboriginal heritage.
<b>Conferences/ seminars</b>	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, a geriatric care conference, state youth conference or cultural awareness seminar.
<b>Education and training</b>	The community services industry requires workers to have formal higher and vocational education qualifications. Organisations should also offer internal training opportunities for workers to update and improve their skills.
<b>Networks</b>	Formal industry networks meet regularly to discuss relevant issues. Informal meetings with key people provide opportunities to remain current, learn, and offer support and guidance when needed.
<b>Formal representatives</b>	There are many occasions when a service needs to engage formal representatives; for example, legal representatives, guardians, or representatives specialising in areas such as women's issues, accommodation and child protection.
<b>Peak organisations</b>	Belonging to a professional organisation allows you to take advantage of seminars offered, access current research and maintain networks. Examples include the Youth Affairs Council Australia and the Australian Council of Social Services.
<b>Publications</b>	Industry journals and organisation/peak body newsletters provide access to industry news, research and case studies; for example, <i>Of Substance</i> , <i>Journal of Intellectual and Developmental Disability</i> , <i>Australian Journal of Social Issues</i> .
<b>Submissions</b>	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

To provide effective representation services you need to evaluate what resources are needed and what resources are available.



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.

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.

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 reference.

- 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.

## Example

### Identify role, processes and conditions of representation

Sally has recently graduated from a course in community services and has successfully secured an advocacy role at a service provider located in an area she is not familiar with. While Sally is excited about this role, she realises that she will have a lot to learn. The community service provider she will work for provides emergency relief to families, takes referrals from other agencies, and provides parenting and youth support.

As Sally has no previous experience as an advocate, and is unsure about her new role, in the days before she starts she reviews her job description, researches the centre, its services and cohort of clients. On her first day in the job, Sally meets with her manager and asks him lots of questions about her new role, and the processes and conditions of the representations and advocacy role she will be undertaking. She also speaks with other team members to gain key insights into the clients who attend the centre, and listens to their accounts of the types of representation the centre provides for its clients and the community.



## Practice Task 1

### Question 1

Briefly outline the difference between representation and making decisions on behalf of a client or group.

### Question 2

Match each type of advocacy to its description.

Systems	Advocating for yourself
Citizen	Advocating for one person
Parent	Advocating that targets an organisation, government department or agency
Self	A member of the community who volunteers to advocate for a person
Individual	Advocating for a parent on issues related to a child or children

### Question 3

Which of the following are functions of advocacy? Tick all that apply.

- Making decisions on behalf of others because they are vulnerable
- Raising awareness of an issue when people are not aware of, or don't understand, the challenges a person or group of people are facing
- Taking action to directly promote the views, rights or needs of the person or people for whom you are advocating
- Handing over responsibility to other key people to bring about changes on behalf of the people you are representing
- Writing reports or submissions to promote the interests of a group of clients



**Question 4**

Provide at least one example of the processes used in both individual and group advocacy.

**Question 5**

Briefly outline why an understanding of the boundaries of your work role is necessary when representing your organisation and advocating for others.

**Question 6**

Suggest at least three examples of government processes and conditions that may need to be considered in the representation process.



**Question 7**

Identify two examples of the structure of community and health services that it can be helpful to understand when representing the diverse needs and interests of individuals and communities.

A large, empty rounded rectangular box with a thin black border, intended for the student to write their answer to the question.

# 1B

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

**To improve the effectiveness of the representation process and its outcomes, develop strategic alliances with key people.**

Consulting with key people is an essential component of formal representation. People with specific expertise and knowledge can help you with community consultation, collaborations, resourcing and effective approaches.

No matter how skilled you are, working with others brings additional skills, knowledge and resources to the service being provided.

### Identify and seek support from key people

**Identifying and seeking support from key people is essential when you are formally representing the interests of service users.**

Key people such as community leaders, policymakers and people working for peak body organisations can provide information, advice and resources that help raise awareness and progress the representation process.

Here are some examples of key people or stakeholders who may be able to provide you with support in your representative role.

Key people	Examples of support
Community leaders and representatives	<ul style="list-style-type: none"><li>• Assist with engaging community members in consultation processes</li><li>• Provide insight into key issues faced by communities</li><li>• Help with the process of developing trust and rapport with communities</li></ul>
Academic experts	<ul style="list-style-type: none"><li>• Provide advice about the needs of specific groups</li><li>• Provide evidence about how to address the needs of specific groups</li></ul>
Policymakers	<ul style="list-style-type: none"><li>• Provide information about time frames for submissions and meetings</li><li>• Provide information about government priorities and processes</li></ul>



Key people	Examples of support
People representing professional groups and interests, such as peak bodies	<ul style="list-style-type: none"> <li>• Provide information about potential collaborations with other organisations; for example, organisations pursuing similar outcomes</li> <li>• Provide information about previous representations and why they were, or were not, successful</li> </ul>

## Industry position statements

**Industry position statements outline the collective position of an industry towards a specific issue, service or group.**

Developing an industry position statement might be part of your role as someone who represents the interests of service users.

For example, you might need to develop an industry position statement about the needs of:

- elderly gay and lesbian people in residential aged care (for a group of aged care providers)
- young people with mental health difficulties in a school setting (for a group of youth mental health care services).

Industry position statements can increase the visibility and promote the interests of service users. Representation strategies are much more effective if decision-makers are faced with a united front from an industry group.

When you are tasked with developing an industry position statement, here are some of the steps you might need to take:

- Determine the key people in the industry.
- 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.



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

Key people who can help develop an industry position statement
Community leaders 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 may provide support regarding current industry standards and research; for example, experienced workers in the industry.
Mainstream media representatives may provide opportunities to canvass a broader section of a community regarding their views, or may help advertise consultation sessions; for example, mainstream newspapers, radio and television representatives.
Policy- or decision-makers may provide valuable information on policy directions or the political climate, or can assist in creating industry position statements that will have an impact when providing representation services.
Resource managers may provide support on the best way to manage human and other resources.
Service-user peak bodies and groups can provide access to member organisations and details of previous industry positions.
Teachers and trainers may provide resources and information based on their research.

## Developing strategic alliances

**Strategic alliances give organisations the opportunity to have a greater impact through joining forces than they would if they were working alone.**

A strategic alliance is an agreement between two or more parties – such as individuals, groups or organisations – to work together towards a mutually beneficial goal while retaining their independence.

Strategic alliances between not-for-profit organisations are often formed through pooling resources to increase the impact of a shared mission. For example, a charity that works with disadvantaged families and a charity that promotes literacy might form a strategic alliance to advocate for mobile libraries in a disadvantaged area.

Some of the benefits and challenges of strategic alliances are outlined below:

Benefits of strategic alliances
<ul style="list-style-type: none"> <li>• Pooling the resources of multiple parties, such as human resources, financial resources</li> <li>• Learning from others in the alliance</li> <li>• Increased impact of strategies</li> <li>• Increased profile within the community</li> </ul>



### Challenges of strategic alliances

- Relationship development requires time
- Conflicts relating to different objectives, priorities or values
- Increased communication channels requiring management
- A drain on resources if alliance partners do not contribute equally

Sources: <https://www.bridgespan.org/insights/library/nonprofit-management-tools-and-trends/strategic-alliances>

## Important considerations

When developing strategic alliances there are a range of important factors to consider, including the following:

### Needs

It is useful to consider why a strategic alliance would be useful. For example, does your organisation need:

- people with specific expertise?
- people with specific connections?
- more resources to assist with a specific goal?

### Networks

When you are considering alliances, think about who can meet the needs you have identified and would benefit from the alliance. In other words, a strategic alliance should benefit both parties.

Begin with your own, or your organisation's, existing networks. Are there individuals, groups or organisations already known to you, or your organisation, that can meet the needs you have identified and would benefit from an alliance?

### Organisational policy

Before you approach people to discuss strategic alliances, make sure you are familiar with your organisation's policies. For example, you may need to get approval from people within your organisation, such as the board, CEO, or supervisor, before you seek out or finalise a strategic alliance.

### Identify the right person/people

When you approach another party about a strategic alliance, make sure you are speaking with the right person. For example, it may be appropriate to approach someone who has the power to approve a strategic alliance, rather than a staff member who is unable to make such decisions.

### Negotiating terms

If you are in the process of negotiating the terms of a strategic alliance with another party, you will need to have a clear proposal that outlines the benefits for them, and/or their clients.



## Example

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

Alannah works as a community liaison officer in a company that provides residential services for people with high-care needs. It is a non-government organisation that receives some government funding but, according to government regulations, residents must pay a bond to enter the facility. This system works well for single residents. However, it does not work as well for couples where one partner needs care and the other does not. If couples in this situation sell their home to pay the bond, the non-residential partner may be left without accommodation.

Alannah decides to investigate the possibility of forming an industry position on this issue to press for change. She begins by contacting Aged and Community Services WA (ACSWA), the largest peak body for aged care services in the state, to gain their support and ask for assistance to access their partners and member organisations.

Alannah then organises a meeting with ACSWA and key representatives from member organisations. She invites a local academic who specialises in aged care legal matters to the meeting, as well as a group of aged care consumer advocates. During this meeting, Alannah and the others write a draft industry position about this issue. After the meeting it is circulated to the group for approval and comments before the next meeting.



## Practice Task 2

### Question 1

Briefly outline why it is important to consult with individuals and key groups when undertaking a representative role.

### Question 2

Provide at least four examples of key groups/people with whom a strategic alliance may be of help.

# 1C

## Determine and implement requirements for reporting, accountability and evaluation

**There are a range of requirements and responsibilities associated with formal representation.**

Workers who provide formal representation to service users are accountable to the individuals and groups they represent, their own organisations and, in some cases, funding bodies. As someone who provides formal representation to service users, you are likely to have responsibilities regarding reporting and evaluation.

Initiatives may lose the support of key people, or organisations may lose funding if reporting, accountability and evaluation processes are inadequate. These losses could ultimately lead to unsuccessful representation and advocacy.

### Reporting requirements

**You need to be familiar with your organisation's requirements regarding reporting, accountability and evaluation.**

Organisations have different reasons for their reporting and evaluation requirements. For example, an organisation may need to report on the outcome of a project to receive ongoing funding.

Reporting requirements are also used within organisations to assist with internal planning, such as staffing and delegation of tasks. Evaluation findings can help services learn about what does, and does not, work.

Individuals who work within organisations need to be familiar with internal reporting and evaluation requirements. For example, you may need to:

- keep records about consultations with key people
- provide regular updates on the progress of a strategic alliance
- complete a report about the outcomes of a specific advocacy initiative.

Services also have a responsibility to the individuals or groups they represent and need to develop structures and processes accordingly. For example, after presenting a petition to a government minister you may be required to hold a meeting with a group of carers, report on the minister's reaction and agree upon further actions.

### Implementing requirements

Here are some factors to consider when implementing reporting, evaluation and accountability requirements:



### Content of reports

In most cases, you need to report outcomes against agreed objectives. Reports may also need to include:

- summaries of consultations
- explanation of actions taken
- feedback from stakeholders.

You may also be required to provide a financial report for accountability purposes.

### Keeping accurate records

Records allow you to keep track of who you have talked to and decisions and actions you have taken.

If you are required to keep records to meet reporting, accountability or evaluation requirements, it is important to make sure they are accurate. Some steps you can take to ensure records are accurate include:

- recording the information as soon as possible after the interaction
- focussing on facts and avoiding emotive language
- writing legibly/entering data correctly.

### Accountability structures

Accountability structures outline how a representation service will measure and report outcomes, and who they will report to. Accountability structures are developed prior to the provision of representative services.

### Time frames

Consider when and how often you will need to report progress and outcomes. Will there be a final report at the end of the representation? Will there be regular reports during the representation, such as quarterly or monthly progress reports?

### Audience

Consider who you need to report to and how this will impact the content of your reports. For example, if you are reporting to funding bodies you may need to use quite formal language. However, if you are reporting to a community group, you may be able to use a less formal tone.

### Format

What is the required format for reporting? Does the report need to be made in writing or verbally? Can it be submitted in an electronic format? Does it need to be presented in a face-to-face meeting?

## Legal and ethical considerations

**As well as being aware of reporting, accountability and evaluation requirements, you also need to be aware of legal and ethical considerations.**



**Consent**

To give permission or to agree to something.

Legal and ethical considerations are especially relevant when you are working with vulnerable people. A person or client must give **consent** for any personal information or health details to be used in a report and shared with others, including with other agencies, government departments, industry groups etc.

When reporting on a representation process you may need to seek permission from the person. If the person is unable to provide consent others may be authorised to do so. However, there are important legal and ethical considerations that need to be identified, and consent must be sought before personal information is used, stored or shared.

**Power of attorney**

When someone is given power of attorney, they are given the power to legally make decisions on another person’s behalf. Power of attorney can be used for decisions relating to medical, financial and/or personal affairs. Laws regarding power of attorney differ between states and territories.

**Guardianship**

**Guardianship** occurs when a person is given control, management and decision-making powers over the welfare and health of a person who does not have the capacity to make decisions about their own health and welfare.

Formal guardianship might be required in a range of situations, such as when a child’s parents have died, or a person is being subjected to neglect or abuse. Guardianship need not cover every aspect of a person’s life and may have a predetermined time limit.

Although the laws regarding guardianship differ according to the state or territory where they are applied, in general a guardian must be at least 18 years or older.

**Legal status of parents and guardians of children and young people under the age of 18**

Parents and 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 the children in their care.

Some of the legal rights of parents and guardians in Australia include the right to:

- bring up one’s children according to one’s own values and beliefs
- make decisions about the child’s education, religion and medical treatment.

**Human rights**

**Human rights** acknowledge the value of every person, regardless of background, appearance, thoughts or beliefs.

These rights are about being treated fairly, treating others fairly and having the ability to make genuine choices in our daily lives. They allow every person to contribute to society and feel included.

Human rights principles are enshrined in a range of Australian laws. For example, equal opportunity and anti-discrimination legislation is designed to ensure that people are not discriminated against based on their age, sexuality, gender, race, ability or religion.

**Guardian**

A person who has the legal authority to make decisions for another person.

**Human rights**

Fundamental rights and freedoms that apply to all people, setting norms for standards of human behaviour.

Source: [idsr.org.au/pdf/Guardianship\\_and\\_administration\\_laws\\_across\\_Australia\\_by\\_Ben\\_Fogarty.pdf](https://idsr.org.au/pdf/Guardianship_and_administration_laws_across_Australia_by_Ben_Fogarty.pdf)

For more information about power of attorney in different states and territories, see the links at: [aspirelr.link/power-of-attorney](https://aspirelr.link/power-of-attorney)

### Video: Human rights

This video from the Australian Human Rights Commission explains the meaning and history of human rights: [aspirelr.link/yt-human-rights](https://aspirelr.link/yt-human-rights)



## Example

### Determine and implement requirements for reporting, accountability and evaluation

Katerina is providing representation to carers of adults with disabilities who are advocating for mental health legislation to be amended.

After consultation with key people, Katerina organises a petition that is presented to the relevant minister on the front steps of Parliament House. Local media are informed about the event in advance, and it receives good media coverage.

During the initial planning stages, Katerina and her co-workers looked at the reporting process and agreed they 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 who were involved in the action.

Katerina keeps detailed records of the consultations she undertakes, as well as the relevant media reports. She also records relevant data relating to the petition, such as the number of people who signed it, and takes photos and video of the event on the steps of Parliament House. Katerina also records the minister's reaction to the petition, and follows-up on responses his office sends regarding changes to the relevant Act.



## Practice Task 3

### Question 1

Provide one reason why it is necessary to keep accurate records during the representation process.

### Question 2

Provide an example of how information collected may be used for accountability of a service.



**Question 3**

List at least four organisational requirements for a report.

**Question 4**

Match each term about legal and ethical requirements to its description.

Legal status of parents and guardians	When a person is given the power to legally make decisions on another person’s behalf – used for decisions relating to medical, financial and/or personal affairs
Human rights	When a person is given control, management and decision-making powers over the welfare and health of a person who does not have the capacity to make decisions about their own health and welfare
Power of attorney	The legal responsibility of parents and guardians to care, protect and make decisions for people under the age of 18 in their care
Guardianship	Fundamental rights and freedoms that apply to all people, setting norms for standards of human behaviour



## Summary

- Formal representation services to a person or group of people must promote their views, rights and needs.
- Advocacy can be formal or informal.
- Representative services can be provided to an individual or a group of people.
- People who can advocate for themselves rely on self-advocacy; some people require other people to advocate for them.
- Different organisations and sectors have different values, processes and structures; community and health services in Australia are complex and diverse sectors.
- When you are formally representing the interests of service users, you will need to identify and seek support from key people such as community leaders, policymakers and people working for peak body organisations.
- Strategic alliances are often formed between not-for-profit organisations to pool resources and increase the impact of a shared mission.
- Reporting requirements are used within organisations to assist with internal planning, such as staffing and delegation of tasks.
- By evaluating their services, agencies can learn about what does and does not work, and make improvements that benefit service users.
- Power of attorney, guardianship, the legal status of parents and guardians and human rights are legal concepts which are relevant to agencies that provide representation services.



# Learning Checkpoint 1

## Establish the representative role and process

### Part A

1. Briefly outline the steps commonly followed during a representation.

2. Identify the differences between individual and a group advocacy. Provide an example with your response.



**3.** Provide two examples of how strategic alliances can assist with the representation process.

**4.** Provide an example for each of the following legal and ethical requirements when advocating for a person or group:

- Power of attorney

- Guardianship

- Legal status of parents and guardians of people under 18 years of age



5. Provide an example for each of the following functions of advocacy:

- Raising awareness

- Acting

- Writing

## Part B

Read the scenario, then answer the questions that follow.

### Case study

You are newly employed as a community services officer at a community day centre that runs programs for older people.

As you develop relationships with your clients, they tell you about issues involving elder abuse. You do some research and discover that there are no local services providing support for people experiencing elder abuse.



## Case study

You discuss this with your team leader and, after a discussion with the board, your employer asks you to represent the interests and concerns of older people being abused in the community.

Over several months you meet with clients, their families and other people who are keen to see change in this area. This includes a university researcher and a prominent local celebrity who agree to be a part of the group. After consultation and negotiation, the objectives of the group are agreed upon. These are:

- to raise community awareness and understanding of elder abuse
- to obtain funding for the community centre to employ a counsellor and advocate to work with people experiencing elder abuse.

After several months, there is increased discussion in local newspapers and radio stations regarding elder abuse. In addition, there is heightened awareness among older clients and their families who attend the community centre, and many clients gain a new understanding of their rights. The board of the organisation have requested a review and evaluation of the representation process so they can approve the employment of a part-time advocate/counsellor for the community centre who will work with the older people and their families.

1. Identify four types of advocacy and identify the type represented in the case study.



- 2. Briefly outline how advocacy will promote the human rights of the older people being represented.**

- 3. List the key people and alliances that were used to support the advocacy actions.**

- 4. Briefly outline what the worker should do to ensure that decisions are made that represent the interests of the older people.**



**5.** Identify at least two reasons why consultation should occur as part of the representation process.

**6.** Provide at least three tips that the worker must consider as part of the representation process when dealing with:

- various industry and government departments and groups

- organisational goals and objectives.



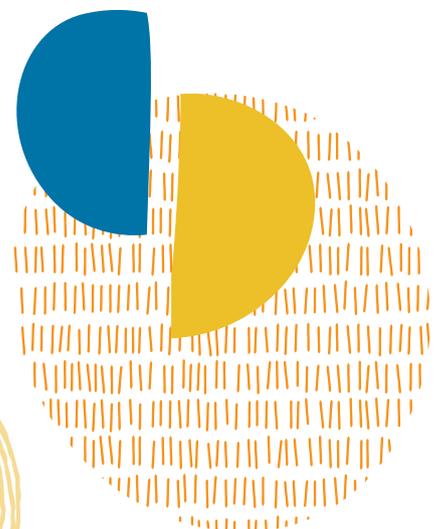
- 7. Suggest three reasons why the group should be accountable, in an evaluation report, for the processes and actions they have undertaken.**





## Topic 2: Represent the interests of the client or client group

- 2A Identify relevant interests and concerns
- 2B Contribute to developing a framework for promoting people's interests
- 2C Create and respond to opportunities to present and promote people's interests
- 2D Determine the impact that 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



# 2A Identify relevant interests and concerns

**When representation services are provided, the interests and concerns of the individuals or group must align with your organisation’s objectives and priorities.**

Your ability to communicate effectively with others is crucial during the representation process. You must also make sure your work aligns with the priorities and objectives of your organisation.

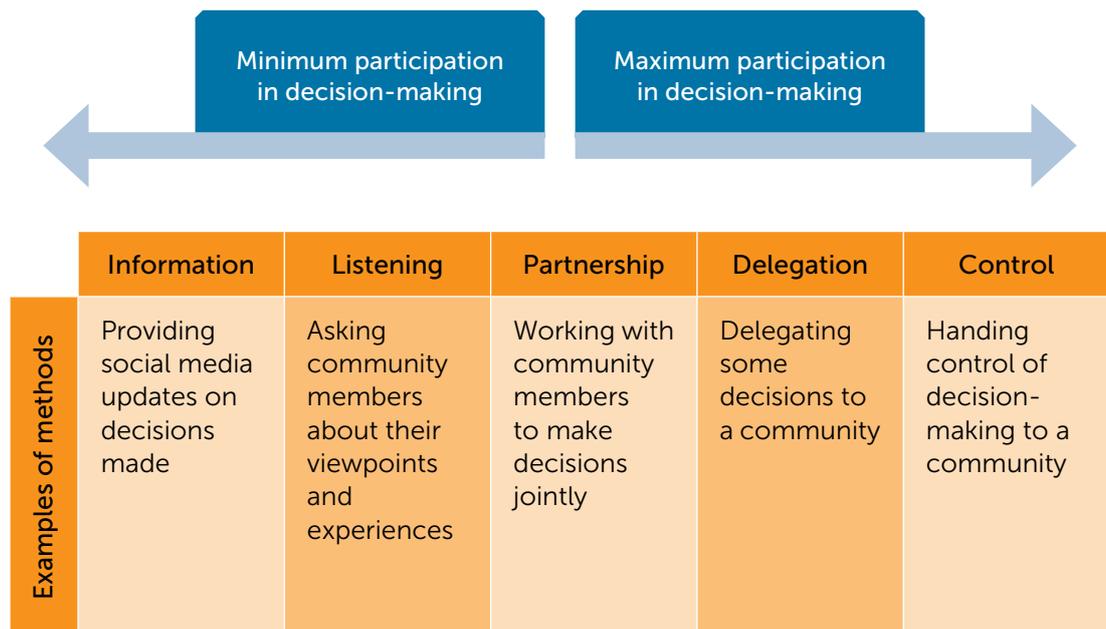
## Community consultation and decision-making

**As a representative you are likely to be involved in facilitating the decision-making process.**

As someone who helps to facilitate the decision-making process, you must understand commonly used community consultation and decision-making processes.

The framework below is adapted from one developed by the Brotherhood of St Laurence, based on the work of multiple experts involved in community consultation.

At one end of the spectrum, the community has minimal participation or involvement in decision-making processes. They are simply provided with information. At the other end of the spectrum, the community has control over the decision-making process.





## Consultation structure

**A consultation structure sets out the processes that will be followed during the consultation process.**

It is likely you will develop a consultation structure through discussions with people who have knowledge of the community you are working with.

For example, if you needed to consult with people living in a block of public housing apartments, it may be useful to consult with people who are familiar with that community to determine where, how, and the best time to undertake the consultations.

Consultation structure
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?

## Consultation methods

There are a range of methods you could use to consult with individuals and communities about their interests and concerns. These include:

- one-on-one interviews
- workshops
- web-based surveys
- discussion groups
- focus groups
- social media.

## Needs assessments

**A needs assessment is a process that generates information about the needs, interests and concerns of an individual or group.**

A needs assessment is useful for determining priorities. For example, the group of people you are working with may have a wide range of interests and concerns. The needs assessment process will help the group to decide which interests and concerns they want to focus on.

For more information about how to undertake a needs assessment see:  
[aspirelr.link/aifs-needs-assessment](https://aspirelr.link/aifs-needs-assessment)



Here are some examples of possible interests and concerns of clients and client groups.

Examples of clients and client groups	Examples of interests and concerns
A person or group of people accessing a service	<ul style="list-style-type: none"> <li>• Unfair or discriminatory treatment</li> <li>• Poor quality of service</li> <li>• Lack of choice for service users</li> </ul>
A person or group of people employed in a specific profession	<ul style="list-style-type: none"> <li>• Low rates of pay</li> <li>• Poor working conditions</li> <li>• Lack of recognition</li> </ul>
Unemployed people living in rural and remote areas	<ul style="list-style-type: none"> <li>• Unrealistic expectations attached to unemployment benefits</li> <li>• Lack of opportunities for employment</li> <li>• Poor transport infrastructure for getting to and from job interviews and work</li> </ul>

## Reviewing documents and resources

In addition to consulting with people to identify the interests and concerns of a person or a group, it may be useful to review documents and resources such as:

- case notes
- organisational reports; for example, the annual report of a health organisation that works closely with a specific community
- community-led websites and social media accounts
- media reports; for example, a TV interview with a community leader
- research articles and reports; for example, an article outlining the findings of a research study involving a specific community.

Reviewing such documents and resources can provide you with information about the interests and concerns of a person or a group. Additionally, they can help you understand the person or community you are working with; such as providing information about the history of a community, or family background of an individual.

## Organisational objectives and priorities

Your organisation’s priorities and objectives may require you to focus on a specific concern or interest. For example, if your organisation aims to improve employment outcomes for young people, concerns relating to unemployed young people would clearly be more relevant than concerns relating to unemployed older people.

The objectives and priorities of your organisation will be outlined in the vision and mission statements and the strategic plans.



Here is an example of values as well as vision and mission statements for an organisation that provides disability services: [aspirelr.link/dsa-mission-values](https://aspirelr.link/dsa-mission-values)

To clarify and refine organisational objectives into objectives that can be used as part of the representation process, it can be helpful to use the SMART acronym as a guide to ensure objectives are clear, detailed and tangible.

<b>S</b>	<b>Specific</b>	Objectives should be clear and precise: Who, what, where and when?
<b>M</b>	<b>Measurable</b>	Objectives should be quantifiable: How many, how much?
<b>A</b>	<b>Achievable</b>	Objectives should be achievable: How will you accomplish the objective? What steps need to be taken to accomplish it?
<b>R</b>	<b>Realistic</b>	Objectives should be practical: Is there the budget to do this? Is there enough time to do this? Do you, or your team, have the knowledge and skills to do this?
<b>T</b>	<b>Time bound</b>	Objectives should have a deadline: What needs to be achieved and by when?

## Example

### Identify relevant interests and concerns

An association that works with Karen refugees (displaced people from Myanmar) has been established in your local area and has approached your organisation asking for assistance in improving services for their local Karen people.

It is your role to identify the interests and concerns of the Karen community.

You begin by talking to your manager about how you might represent the interests of the service and how this aligns with the priorities of your organisation. You then consult with the association to establish your role and relevant processes and undertake some basic research regarding the Karen people.

The next step is to 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 organise for an interpreter to attend these meetings.

During these meetings, you find out that the association's clients want to pursue educational and employment opportunities for themselves and their children. Their main concerns are the lack of English language classes available and the lack of training to help them settle into the community.



## Practice Task 4

### Question 1

List at least three different ways consultation can occur to determine the interests and concerns of a person or a group.

### Question 2

Which of the following statements are correct? Select yes or no for each one.

a. Levels of community involvement in decision-making varies from minimal participation to control over the decision-making process.	Yes / No
b. A consultation structure sets out the process for who, what, when and how the consultation process will take place.	Yes / No
c. A needs assessment can be undertaken to determine the resources required for the representation process.	Yes / No
d. A partnership in decision-making means setting up consultation activities with like-minded community organisations.	Yes / No

### Question 3

Provide at least one reason why an organisation's priorities and objectives need to be considered when identifying the interests and needs of the group or individual.

# 2B

## Contribute to developing a framework for promoting people's interests

**Once interests and concerns have been determined, the next step is to develop a framework for promoting these interests and concerns.**

A framework will help with organisation and planning for representation and advocacy. It helps to clarify specific strategies and actions and should include information about how the relevant interests of the person or group are going to be promoted.

A framework provides a structure for the process of advocacy and representation.

### Frameworks and structure

Some of the questions a framework might answer include the following:

What is our goal? What are our objectives? What are our priorities?	<ul style="list-style-type: none"><li>• Raise awareness of drought and its impact on the mental health of farmers and their families</li><li>• Improve public housing for families with young children</li><li>• Make public parks more accessible for people with physical disabilities</li></ul>
Who are we trying to influence? Who is the target audience?	<ul style="list-style-type: none"><li>• Policymakers</li><li>• Local government</li><li>• Community leaders</li><li>• Voters within a specific electoral district</li><li>• The general public</li></ul>
What do we want to change?	<ul style="list-style-type: none"><li>• Awareness of an issue; for example, public awareness of youth homelessness</li><li>• Commitment to an issue; for example, politicians' commitment to address youth homelessness</li><li>• Actions taken; for example, a new housing policy aimed at reducing youth homelessness</li></ul>
What strategies are we going to use to achieve our goal?	<ul style="list-style-type: none"><li>• Social media campaign designed to raise public awareness</li><li>• Media exposure about an issue</li><li>• Online petition</li><li>• Rallies, marches, demonstrations</li><li>• Lobbying and networking</li><li>• Developing a submission for a parliamentary inquiry</li></ul>

Source: [evaluationinnovation.org/wp-content/uploads/2015/03/Advocacy-Strategy-Framework.pdf](https://evaluationinnovation.org/wp-content/uploads/2015/03/Advocacy-Strategy-Framework.pdf)



As with every task you undertake in your role as a representative, it is not your place to decide what the framework should include. Rather, your role is to perform the work required to put together a framework that represents the interests of the person or people you are representing. This will involve consultation and facilitation of decision-making processes.

The following example uses a framework for promoting the concern of a community group:

Goal	Stop housing development in a bushland reserve
Target audiences	<ul style="list-style-type: none"> <li>• Voters in the state election</li> <li>• Local members of parliament (state and federal)</li> </ul>
Change	<ul style="list-style-type: none"> <li>• Awareness about the housing development and its impacts</li> <li>• Commitment to stop the housing development</li> <li>• Actions taken to stop the housing development</li> </ul>
Strategies	<ul style="list-style-type: none"> <li>• A social media campaign designed to raise public awareness among voters about the housing development</li> <li>• Online petition to establish commitment to stopping the development</li> <li>• Lobbying local members of parliament</li> </ul>

## Additional questions to consider

Ask questions to confirm you have captured all the information you need:

What do we want to achieve with each audience?	<p>If you are targeting multiple audiences, such as voters and local politicians, are you trying to achieve different goals for each audience?</p> <p>For example, perhaps you want to raise awareness among voters and obtain a commitment from politicians.</p>
What assumptions are we making about how change occurs?	<p>What assumptions are you making about how your strategies will lead to the outcome you're seeking? Are those assumptions correct?</p> <p>For example, perhaps you're assuming that convincing a group of policymakers about the importance of an issue will lead to policy change.</p> <p>You need to consider whether the policymakers you're targeting have the power to bring about those changes.</p> <p>Are there other factors that might make it difficult for those policymakers to make those changes? If so, what does this mean for the strategies you are relying upon? For example, do you need to incorporate additional strategies to ensure the policy change can actually happen?</p>



<p><b>Who else is working in this space?</b></p> <p><b>What strategies are they using to promote the interests of a client or client group?</b></p>	<p>If other organisations and groups are working on the same or similar interests and concerns, what gaps need to be filled?</p> <p>For example, perhaps the peak body for social services is generating awareness among the general public about homelessness via a social media campaign.</p> <p>Could you advocate for a more specific client group, such as young homeless people? Or could you pursue a different strategy to complement what is already being done, such as by lobbying politicians?</p>
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Source: <https://www.evaluationinnovation.org/wp-content/uploads/2015/03/Advocacy-Strategy-Framework.pdf>

## Advocacy methods

There are two main types of advocacy:

- Lobbying
- Campaigning.

<p><b>Lobbying</b></p>	<ul style="list-style-type: none"> <li>• Influencing decision-makers through direct, private communications</li> <li>• Meetings with decision-makers</li> <li>• Private correspondence with decision-makers, such as via email, phone calls</li> </ul>
<p><b>Campaigning</b></p>	<ul style="list-style-type: none"> <li>• Speaking publicly on an issue to generate a response to that issue from a large group of people</li> <li>• Public events</li> <li>• Large-scale advertising campaigns</li> <li>• Billboards</li> <li>• Emailing people on a subscriber list</li> <li>• Newspaper editorials</li> </ul>

Source: <https://www.ncbi.nlm.nih.gov/books/NBK195431/>

Electronic advocacy campaigns, also known as digital advocacy, rely on technology to generate a response from a large group of people.

Using electronic means to advocate for change is especially effective in the digital age. The technology used for electronic advocacy campaigns could include:

- social media
  - tweets
  - Facebook advertising
  - Facebook posts
  - Instagram stories
- text messaging
- blogs
- email bulletins and newsletters.



For more information about digital advocacy see: [aspirelr.link/ctb-digital-advocacy](https://aspirelr.link/ctb-digital-advocacy)

## Types of strategies

### Selecting appropriate strategies for promoting the interests of a person or group is critically important.

Selecting the wrong strategy could damage your chances of bringing about change. For example, you want to increase public awareness of an issue but the strategy you choose is to develop a submission for a parliamentary inquiry. You may raise awareness of an issue among key decision-makers but not reach the general public.

Numerous theories have been developed to help guide the process of deciding what are the most appropriate strategies for achieving different objectives. For example, Jack Rothman identified three approaches for bringing about change in communities. These are the:

- social planning model
- locality development model
- confrontational model.

Appropriate strategies for each of these models are described below. Note that a combination of these models could be used to promote the interests of a client or client group:

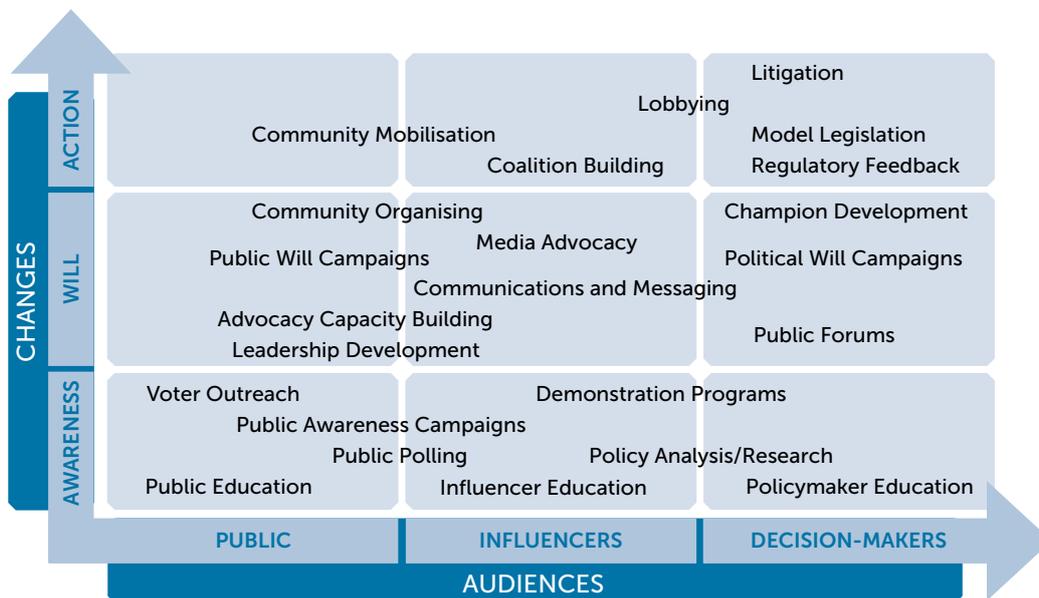
<p><b>Social planning model</b></p>	<p>The social planning model emphasises that experts are required for change to occur. Strategies include the following:</p> <ul style="list-style-type: none"> <li>• Participate in boards or committees of decision-making organisations.</li> <li>• Meet with government department representatives and politicians who can influence the decision-making process.</li> <li>• Share your research with other stakeholders to promote interest.</li> <li>• Organise partnerships or alliances to increase lobbying power.</li> <li>• Provide those you represent with opportunities to speak at parliamentary hearings or inquiries.</li> <li>• Organise public meetings or debates to promote interests and develop resolutions for change.</li> <li>• Write press releases and briefing documents to promote the interests of those you represent.</li> <li>• Work with legal advocates to develop a test case to bring before a court or tribunal where appropriate.</li> </ul>
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<p><b>Locality development model</b></p>	<p>Locality development is a participatory model of change. For change to occur, broad community participation is necessary. The aim of locality development is getting a group to reach consensus on common concerns and to collaborate to resolve issues. Here are some strategies:</p> <ul style="list-style-type: none"> <li>• Organise specific, targeted community education campaigns.</li> <li>• Use brochures, the media, public meetings, interviews and social media.</li> <li>• Arrange community meetings to promote understanding of the interests of those you represent.</li> <li>• Organise partnerships with community groups/leaders and other community services organisations to gain support and promote interests.</li> <li>• Celebrate achievements publicly to ensure ongoing support.</li> </ul>
<p><b>Confrontational model</b></p>	<p>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:</p> <ul style="list-style-type: none"> <li>• Organise marches or demonstrations to promote the interests of those you represent.</li> <li>• Develop advertising campaigns using graphic images of issues faced by those you represent, as well as solutions.</li> <li>• Organise street theatre to promote interests.</li> </ul>

### Other frameworks

Jack Rothman’s approach to deciding upon appropriate strategies is one of many. For example, another useful model is The Advocacy Strategy Framework. The Advocacy Strategy Framework highlights how different strategies are effective for different audiences, and for different types of changes that you are working to achieve.





When using the framework, first you identify the audience and the change you want to bring about; then you look at which strategies are most appropriate. For example, if you are targeting the general public and wanting to bring about a change in commitment, or 'will', the appropriate strategies are:

- community organisation
- public will campaigns
- advocacy capacity building
- leadership development.

For more information about The Advocacy Strategy Framework see:  
[aspirelr.link/advocacy-strategy-framework](https://aspirelr.link/advocacy-strategy-framework)

## Example

### Contribute to developing a framework for promoting people's interests

A peak body uses a social planning framework to raise awareness of the impact of family violence on the community. Their strategies for raising awareness include:

- meeting regularly with the Minister for Human Services to discuss legislative and policy changes, as well as best practice and research outcomes
- developing working relationships with government agencies, particularly the police, housing and Centrelink to ensure the support of those they represent.

Every year they also organise a march through the city to honour those who have died due to family violence, and to champion the idea that everyone has the right to feel safe.



## Practice Task 5

### Question 1

Match each term about the structure for the advocacy and representation process to its description.

Change	Increase the number of childcare places for families living in a small country town
Strategies	Local members of parliament (state and federal) Local community Families living in and around the area
Goal	Awareness of the impact lack of childcare has on families and the local economy Actions to have a new council run childcare services in the town Actions to increase the number of places available at the existing childcare centre
Target audiences	Social media and local newspaper campaign to promote the needs of families Recruit the support of state or territory and federal peak body organisations Lobby local members of parliament

### Question 2

Provide three examples of digital advocacy that can be used during representation of a client or client group.

# 2C

## Create and respond to opportunities to present and promote people's interests

**Promoting and representing the interests of clients is an ongoing part of your role.**

Annual events are timely prompts to remind us of the importance of representing specific client groups. A good example is NAIDOC Week, which reminds us about the interests and concerns of Aboriginal and Torres Strait Islander peoples. Children's Week prompts us to consider the interests and concerns of children. Nevertheless, promoting and representing the interests of service users is something you should be doing whenever you can.

This should not be a passive process; you shouldn't only be promoting and representing service users when you have been specifically asked to do so. You should be actively seeking out and responding to opportunities to promote and represent service users.

### Creating opportunities

**There are a number of things you can do to create opportunities to reflect, promote and represent the interests of service users.**

When you are creating opportunities you must always refer to your organisation's policies and processes.

For example, your organisation may have a policy that restricts employees from participating in rallies unless they do so as a private citizen and on their own time. Your organisation is also likely to have policies relating to speaking with the media and use of social media. You need to be aware of these policies before you create opportunities to promote and represent clients and client groups.

Opportunities you could create to promote the interests of clients include the following:

#### Participate in relevant events

Participate in events; for example, you could:

- work with your colleagues to set up a stall at a conference that involves your target audience
- bring together a group of colleagues to represent your organisation at a rally or march



<p><b>Generate publicity</b></p>	<p>You can generate publicity about an issue by:</p> <ul style="list-style-type: none"> <li>• creating press releases or media statements</li> <li>• inviting the media to attend events</li> <li>• inviting the media to visit your organisation</li> <li>• inviting the media to meet with clients to hear their stories, interests and concerns.</li> </ul>
<p><b>Join committees</b></p>	<p>Become a member of a committee, such as a committee in the local community or a committee representing the interests of a group of professionals in the community.</p> <p>As well as providing opportunities to promote the interests of your clients, membership of the committee may also provide you with opportunities to network and learn about relevant events.</p> <p>Being a member of a community committee or group is common for people who work in community services. Opportunities to work alongside a community, or with other organisations, is usually viewed positively by organisations in the community services sector.</p>
<p><b>Present to relevant audiences</b></p>	<p>You could present to individuals, committees or industry groups to promote the interests of a client or client group.</p> <p>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.</p> <p>Your presentation could include:</p> <ul style="list-style-type: none"> <li>• videos featuring clients</li> <li>• statistics</li> <li>• case studies</li> <li>• a 'call to action'.</li> </ul>
<p><b>Target policymakers and decision-makers</b></p>	<p>Pursue opportunities to influence the development of policies that impact on the people you represent by targeting policymakers and decision-makers. This could be achieved by:</p> <ul style="list-style-type: none"> <li>• meeting with or lobbying policymakers and other key people involved in making decisions</li> <li>• presenting petitions or submissions to politicians</li> <li>• encouraging clients and client groups to participate in parliamentary hearings or inquiries.</li> </ul>

## Everyday interactions

**Everyday interactions with other professionals, colleagues and organisations provide great opportunities to promote and represent the interests of clients.**



For example, a casual conversation with a policy advisor at a conference might provide you with an opportunity to make them aware of the interests of a client group. The policy advisor might mention, for example, a report they recently read about homelessness among women who have escaped an abusive relationship. You might respond to their comment by reflecting upon the needs of young people who are homeless because of abuse.

You might follow up on the conversation, a week later, with an email to the advisor. This could summarise some of the key issues for young homeless people and include an attachment detailing the latest statistics about young homeless people and their experiences of abuse and neglect in the home.

Organisational policies and processes are just as relevant to these everyday interactions as they are to more formal opportunities for promoting and representing client interests. For example, you need to be sure you are not breaching policies designed to protect clients' privacy or, due to contractual obligations, you may not be able to share a report until it is finalised.

## Example

### Create and respond to opportunities to present and promote people's interests

Dev is a worker in a large community services organisation that provides disabilities, youth work, financial counselling, emergency relief, housing and advocacy services. As part of his role, Dev attends monthly regional networking meetings with other community services organisations. He also attends the annual industry conference.

Dev has recently started advocating for a group of young mothers who cannot return to education due to a lack of affordable childcare. Dev takes the opportunity at a networking meeting to discuss the issue with representatives from other organisations to gain their support and develop an industry position statement.

At the annual conference, Dev works with a group of young mothers to present a session to industry and government representatives. Following this, a meeting is set up with the education department to discuss solutions to the problem.



## Practice Task 6

### Question 1

Provide three examples of opportunities you can create that will promote an individual or group's interests.

### Question 2

Suggest examples of how everyday interactions or chance meetings can be used to promote the interests of a group or individual.

# 2D

## Determine the impact that developments and decisions will have on objectives and priorities and how to measure success

**The objectives and priorities of the representation process can be impacted by a variety of decisions and developments.**

There are several factors that can impact on the representation services you are providing. For example, circumstances among the people you are representing may change, there may be developments in your organisation or decisions made regarding government policy.

These impacts can be positive or negative. A positive development might be additional funding awarded to your organisation, meaning you have more resources to advocate for service users. A negative development might be a change in government, leading to a shift in policy priorities.

As well as determining the potential impacts from decisions and developments, it is necessary to measure the success of the representation services you provide. By measuring successes, you can demonstrate accountability, both to the people you are representing and to other key stakeholders in the process.

### Decisions and developments

**It is important to assess the impact of developments and decisions when you are representing the interests of service users to determine if you need to revise the process.**

Decisions and developments that might impact upon the representation process could relate to:

- the individual or group you are representing
- the organisation you work for
- broader social and political factors.

For example, you have been campaigning for adequate healthcare to be provided for a group of unwell workers on a cargo ship docked at an Australian port. Your state government announces that a team of healthcare workers will be visiting the cargo ship to provide healthcare services for the unwell workers. You would then need to assess:



- if your campaign is still relevant or if the objectives have been achieved. Was your objective to ensure ongoing healthcare for this group of people? Is that what is going to be provided, or is this a one-off visit by healthcare workers?
- whether you need to change the messaging in your campaign. Do your priorities need to change? Perhaps you could campaign for improved healthcare for *all* people who work on cargo ships, not just this specific group?

Here are some other examples of decisions and developments that might impact the objectives and priorities of a representation or advocacy campaign and how they might impact those campaigns:

External environmental factors
<p>Social, political, economic or industrial changes</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>• Changes to social policy</li> <li>• Changes in the priorities of the individual, group or community represented</li> <li>• Changes to the industry or to an industry position</li> </ul> <p><b>Potential impacts:</b></p> <ul style="list-style-type: none"> <li>• Increase or decrease in funding or public awareness</li> <li>• Changes to the type of action required</li> <li>• Changes in support for representation</li> </ul>
Events within and outside the organisation structure
<p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>• Changes in management, staffing or services provided</li> <li>• Changes to funding arrangements</li> </ul> <p><b>Potential impacts:</b></p> <ul style="list-style-type: none"> <li>• Changes in the organisation's priorities</li> <li>• Lack of available staff</li> <li>• Changes in staff working on representation</li> <li>• Lack of funding for the representation services</li> </ul>
Government policy
<p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>• Changes to legislation</li> <li>• Changes to government departmental policies relating to an issue</li> </ul> <p><b>Potential impacts:</b></p> <ul style="list-style-type: none"> <li>• Impact on organisational structure and reporting requirements</li> <li>• Changes to staff requirements</li> <li>• Changes to funding requirements</li> </ul>



Ideological factors
<p><b>Examples:</b></p> <ul style="list-style-type: none"><li>• Change of focus for those represented or the organisation</li><li>• Changes in goals or expectations</li></ul> <p><b>Potential impacts:</b></p> <ul style="list-style-type: none"><li>• Need to revisit the representation and promotion strategies to meet new priorities or goals</li></ul>
Educational factors
<p><b>Examples:</b></p> <ul style="list-style-type: none"><li>• Changes in education or training courses</li><li>• Changes to minimum educational requirements of staff</li></ul> <p><b>Potential impacts:</b></p> <ul style="list-style-type: none"><li>• Changes to staff due to lack of appropriate qualifications leading to slow down of representation as new staff members are recruited and trained</li></ul>
New research findings
<p><b>Examples:</b></p> <ul style="list-style-type: none"><li>• Increased knowledge regarding an issue</li><li>• Changes to the understanding of an issue</li></ul> <p><b>Potential impacts:</b></p> <ul style="list-style-type: none"><li>• Changes to focus or priorities of representation</li><li>• Increased/decreased support for representation based on research outcomes</li></ul>
Community changes
<p><b>Examples:</b></p> <ul style="list-style-type: none"><li>• Changes in concerns or interests of the community</li><li>• Changes to the urgency of an issue</li></ul> <p><b>Potential impacts:</b></p> <ul style="list-style-type: none"><li>• Changes to priorities of the representation</li><li>• Changes to the action agreed on</li></ul>

You need to monitor decisions and developments on an ongoing basis. Members of your strategic alliance should also be able to keep you updated about relevant decisions and developments.

## Assessing impacts

Here is an example of steps you might take to determine the impact of developments and decisions on the objectives and priorities of a representation or advocacy campaign.

- Identify decisions and developments that have occurred.
- Assess each development and decision to determine if the impact is positive or negative.
- Consider the campaign 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 at the start, and then on an ongoing basis as the representation progresses.

## Example

### Determine the impact of developments and decisions and the processes for measuring success

A government funded organisation that provides crisis accommodation for people with Acquired Brain Injuries (ABI) has recently had to turn individuals away due to a lack of beds. The organisation's representation service, led by James, arranges a meeting with the Minister for Housing together 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 they will be in touch, but that priorities within the government have changed. This development may impact on possible funding, so James immediately contacts the key people and the organisation involved to discuss a response and further action.

## Measuring success

**Measuring success can help your organisation learn what does and does not work. It also demonstrates accountability.**

The 'M' of the SMART acronym discussed earlier stands for 'measurable' and indicates that objectives must be quantifiable.

Some successes are easier to measure than others. For example, if the goal of representation is to obtain funding for a service, you know you have succeeded if the funding is provided.



In other cases, such as if your goal is to raise awareness of an issue, it can be harder to determine when you have achieved success. For example, 10% of your target audience have heard about an issue, but is this enough? Should it be at least 25%? Is it enough for people to have simply heard about an issue, or do they need to have changed their perception of the issue in some way?

As with all aspects of representation and advocacy work, you must work with the people you are representing to determine what successful representation will mean in each individual case, and how you are going to measure your success.

The following are the five key steps involved in measuring the success of an advocacy initiative:

Identify your goals	Identify the goals of the representation
<p><b>Prioritise the most important issues</b></p>	<p>Determine and prioritise the most important issues.</p> <p>Questions that might assist with this process include:</p> <ul style="list-style-type: none"> <li>• Is there a specific issue that the group wants to address?</li> <li>• What change will have the biggest impact on the person/s you are representing?</li> <li>• Is there an issue that aligns with your organisation’s objectives and priorities?</li> <li>• Is there another organisation advocating for change in this area? If so, what are the gaps in the current advocacy efforts? Is there a specific subgroup whose voice is not being heard?</li> </ul>
<p><b>Determine meaningful data</b></p>	<p>You need to decide what data will indicate that the representation has been successful.</p> <p>In other words, what information will you need to demonstrate that the objectives of the representation have been achieved?</p> <p>This could be data relating to policy, or relating to behaviours, attitudes and commitments of decision-makers.</p>
<p><b>Decide how you will collect data</b></p>	<p>There are a range of different methods you can use to collect data including:</p> <ul style="list-style-type: none"> <li>• interviews with key people</li> <li>• surveys for people in a community</li> <li>• reviewing policy documents and documents relating to government priorities and initiatives; for example, speeches or budget documents</li> <li>• reviewing media reports; for example, how many times a specific issue is reported upon</li> <li>• reviewing social media posts; for example, comments on a blog.</li> </ul>
<p><b>Evaluate success</b></p>	<p>The final step in the process is to evaluate the success of the representation.</p> <p>This could be done throughout the course of the representation, or after it has concluded.</p>



Sources: [https://www.asaecenter.org/resources/articles/an\\_plus/2016/july/5-tips-for-measuring-your-advocacy-success](https://www.asaecenter.org/resources/articles/an_plus/2016/july/5-tips-for-measuring-your-advocacy-success)  
[https://www.open.edu/openlearncreate/pluginfile.php/128097/mod\\_resource/content/1/Monitoring%20and%20evaluating%20advocacy.pdf](https://www.open.edu/openlearncreate/pluginfile.php/128097/mod_resource/content/1/Monitoring%20and%20evaluating%20advocacy.pdf)

For more information about planning an evaluation see: [aspirelr.link/aifs-plan-eval](https://aspirelr.link/aifs-plan-eval)

## Practice Task 7

### Question 1

Briefly outline how frequently a review should be carried out to check objectives, priorities and the measures of success.

### Question 2

Provide examples of two questions that can be asked to check objectives and priorities are correctly focused.

### Question 3

Select one development that may occur as part of the representation process and suggest at least three impacts it may have on the representation.

# 2 E

## Provide progress and other reports and feedback to key people

**Progress reports help keep key people updated on the progress of the representation and advocacy process.**

Services that represent the interests of service users typically have their own internal reporting requirements. Funding bodies, government departments and other stakeholders may have specific reporting requirements you need to follow.

Reporting can be formal or informal. For example, you may need to provide a formal written report to a funding body and give an informal update on progress to your manager. The process of providing feedback to key people is usually informal.

### Reporting requirements

**Most organisations have specific requirements for reporting to key people.**

It is important to follow organisational requirements when you are reporting. Your organisation may have reporting requirements regarding:

- who you provide reports to
- how you provide reports to key people, such as a written report, formal presentation, video conferencing call
- when you provide reports to key people, such as fortnightly, monthly, quarterly
- the structure and format of reports, such as a report template.

In most cases, timelines for reporting will be agreed during the planning stages of a representation process.

Here are some examples of key people you may need to provide reports to, along with examples of types of reporting.

Examples of key people	Examples of reporting
Your manager or management team	Providing your manager or a management team with weekly email updates on the progress of representation
Your organisation's board	Giving a formal presentation to your organisation's board to report the outcomes of representation
Funding bodies	Providing a quarterly report to funding bodies on the progress of representative processes



Examples of key people	Examples of reporting
Individuals you are representing	Providing informal updates to individuals about the progress of representation
Community groups	Facilitating a question and answer session with community groups to explain the representation process
Community leaders	Giving a formal presentation to community leaders about draft plans and strategies for the representation process
Experts in the sector	Giving a presentation at a conference to share what you and your organisation have learned about the process and outcomes of the representation process

The process of providing feedback to key people is usually less formal than the reporting process. For example, during an informal discussion with a community leader, you might provide some general feedback on some strategies they have suggested.

## Work role

In addition to understanding your organisation's reporting requirements, it is important to also understand the reporting processes and structures that are relevant to your work role. For example, you may need to:

- get authority from your manager before you submit a report to a partner or funding body
- routinely gather data and information from your colleagues for the purposes of reporting.

Organisational processes and structures may also be relevant when providing feedback to key people. For example, rather than yourself, it may be more appropriate for a senior person within your organisation to provide feedback to a senior community leader.

The processes, structures and requirements relevant to reporting and providing feedback to key people should be outlined in an organisational policy or a project plan. If you are unsure about your responsibilities regarding reporting or providing feedback, check with your manager or supervisor.

## Types of reporting

**You might be required to provide a range of different types of reports to key people.**

Progress reports are provided to key people to keep them updated on the representation and advocacy process. Other reports you may need to supply key



people with include evaluation and final reports. These are typically provided at the end of a process or project.

When providing written reports to funding bodies and government departments, you may need to use a specific template designed for that purpose. Some organisations may not accept reports if they are not presented in the appropriate format.

Types of reports	Description	Potential content
<b>Progress reports</b>	Provides an update on the progress of a project, initiative or campaign. Typically provided during the project, initiative or campaign, rather than after it is completed.	<ul style="list-style-type: none"> <li>• Goals of project</li> <li>• Tasks involved</li> <li>• List of completed tasks</li> <li>• List of next steps</li> <li>• Barriers and obstacles</li> <li>• Updated timelines</li> </ul>
<b>Evaluation reports</b>	Provides a summary of the outcomes and effectiveness of a project, initiative or campaign. Used to highlight what worked, what didn't work and what lessons were learned.	<ul style="list-style-type: none"> <li>• Goals of project</li> <li>• Outcomes of project – compared to goals</li> <li>• Data relating to effectiveness, such as survey data relating to public awareness of an issue</li> <li>• Discussion of barriers and obstacles</li> <li>• Summary of key lessons learned</li> </ul>
<b>Final reports</b>	Provides a summary of an entire project, initiative or campaign. Provided after the project, initiative or campaign is completed.	<ul style="list-style-type: none"> <li>• Goals of project</li> <li>• How a project was carried out</li> <li>• Project outcomes</li> <li>• Future directions</li> <li>• Recommendations</li> </ul>
<b>A formal record of representation</b>	Provides clients with information about the progress of representation along with a clear statement on the objectives and purpose of the representation.	<ul style="list-style-type: none"> <li>• Purpose of representation</li> <li>• Objectives of representation</li> <li>• Participants in representation</li> <li>• Strategies for representation</li> <li>• Progress of strategies</li> <li>• Timelines for completion</li> </ul>



## Example

### Provide reports and feedback to key people

Here is an example of a report describing the progress of representation services designed to promote the interests of culturally and linguistically diverse people in the community, provided by a community health service.

#### Monthly Progress Report for the Kintaala Community Health Centre

Date: March 2022

##### Summary of actions taken

- A meeting with local community leaders to discuss interests and concerns of their communities; representatives were from the
  - Burmese Association
  - Asian Australian Friendship Club
  - Macedonian Club
  - Multicultural Association.
- Discussion with the local newspaper regarding publishing a story about the communities' interests, needs and concerns.

##### Summary of outcomes

- The local newspaper will send a reporter and a photographer to the centre to take photos of community leaders. They have agreed that it will appear on the front page and a further story on the planned event will be written later.
- Community leaders will organise consultations with their communities to canvas interests, needs and concerns.
- The health centre will also attend a multicultural event to help build trust and rapport with communities.

##### Future action

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

- Story to be published in the local newspaper
- Meetings with more local community leaders
- Follow up on community consultations being led by community leaders
- Attend multicultural events in the local community



## Practice Task 8

### Question 1

Suggest at least four different groups you might be required to report to.

### Question 2

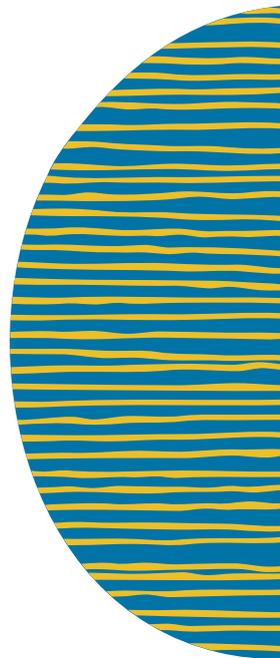
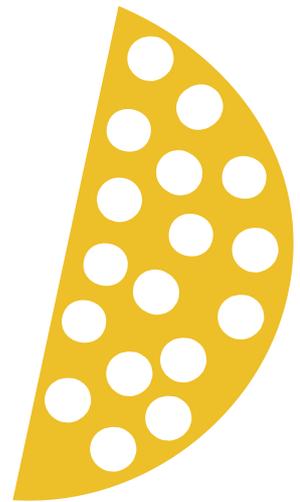
Which of the following relate to providing progress reports and feedback to key stakeholders? Tick all that apply.

- Reporting requirements can mean a specific structure and format must be used, such as a report template.
- Reports can be presented to a group face to face or via a video conferencing call.
- A manager would need to give authority before a report is submitted to a partner or funding body.
- Feedback data gathered from colleagues should not be used, because it can be biased and inaccurate.
- Progress reports provide a summary of the outcomes and effectiveness of a project, initiative or campaign.



## Summary

- Objectives need to be clear, detailed and tangible.
- When providing representation services you must understand the interests and concerns of the individuals or group you are representing.
- A consultation structure sets out the processes to be followed during the consultation process.
- The interests and concerns of the people you are representing need to align with your organisation's objectives and priorities.
- A framework provides a structure for the process of advocacy and representation. It should include such information as the goals of representation, who you are trying to influence and what you want to change.
- Lobbying and campaigning are the two main types of advocacy. Lobbying involves direct communication with the people you are trying to influence whereas campaigning involves speaking publicly about an issue to generate a response.
- Selecting appropriate strategies for promoting the interests of a person or group is critically important; selecting the wrong strategy could damage your chances of bringing about change.
- Changed circumstances among the people you are representing, developments in your organisation, and government decisions regarding policy can all impact on the representation services you are providing.
- There are five key steps involved in measuring the success of an advocacy initiative, beginning with identifying your goals.
- Reporting processes can be formal or informal, depending upon organisational requirements.





## Learning Checkpoint 2

### Represent the interests of the client or client group

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

#### Case study

You are employed at an organisation that arranges social and recreational activities for young people with disabilities. Its vision statement says that it will work towards an accessible and inclusive community in which the human rights of belonging, contribution, potential and diversity of all people with disability are recognised, respected and celebrated with pride.

One of your clients is Cath, a 19-year-old woman with autism. Cath loves any activity involving water and, after spending a few months building her confidence and skills, she attends the local council swimming pool with two of her friends. The independent activity has been great for Cath's self-esteem.

Today, when Cath arrives for a group activity at the organisation, you notice that she is unhappy and withdrawn. She tells you that yesterday, when she was at the swimming pool, a member of staff called the manager who told Cath she was being disruptive and would have to leave. As she left, the staff member told Cath she shouldn't come back to the pool because she "scares the kids".

Cath has experienced other barriers to her participation in community sporting and recreational activities in her local area. For example, she was unable to get a club official to unlock the disability toilet in the change rooms as the staff member said if it was left open it would be graffitied.

Cath is unhappy with the way she is being treated and with the attitude of the community to her disability. She asks you to work with her to change the attitude and culture of the local community sporting and recreational clubs.



- 1.** Briefly outline if the organisation's priorities align with Cath's issue and request for representation.

- 2.** Briefly outline a framework for the promotion of Cath's interests.



3. Provide at least three examples of opportunities that would promote and represent Cath's interests.

4. Outline the level and type of decision-making Cath may want to be consulted about in the representation process.

5. Identify at least one measure of success that you could use to determine the impact of the representation and changes made.



- 6.** You are required to provide an update on the progress of the representation to the board of management and to Cath.

Suggest three organisational requirements that you would need to consider when preparing for the report.

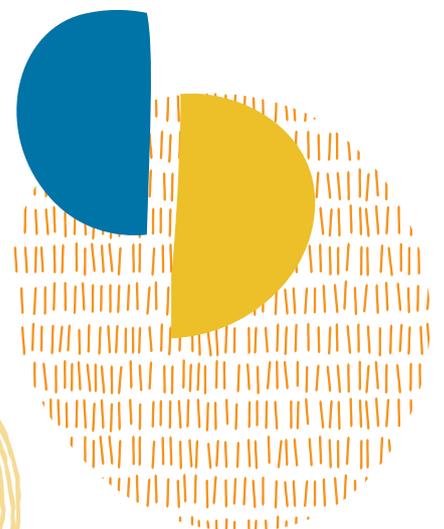
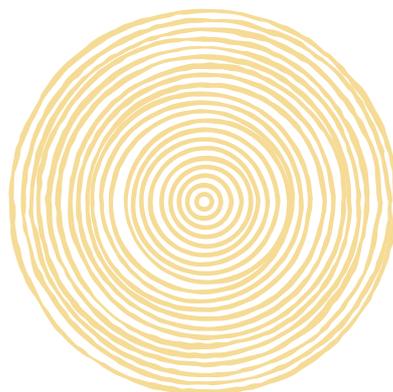
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## Topic 3: Negotiate outcomes and liaise with key people

- 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 Work with organising committees and boards of management to maximise effectiveness



# 3A Communicate and promote purpose and objectives

**For representation and advocacy to be successful, key people must understand the purpose and objectives of the initiative.**

When decision-makers and stakeholders have a clear understanding of what you hope to achieve through your representation – and why you are seeking to achieve it – it will help them determine what role they can play in supporting these goals.

To bring about change you need to be able to effectively promote the purpose and objectives of your representation. Additionally, you need to convince key people that the issues and concerns you are promoting are worthwhile and important.

## Communication methods and approaches

**There are many ways to communicate the purpose and objectives of representation to key people.**

You might communicate the purpose and objectives of representation to key people in a variety of ways, including:

- an oral presentation
- an email
- a written summary.

The method and approach you use will depend upon:

- who you are communicating with
- your organisation's policies and processes
- the preferences and needs of your client or clients.

Here are some things to consider regarding the culture of different institutions and groups:

### Communicating with government

- Government policymakers operate in high pressure, information-rich environments, so make your communications as concise and impactful as possible.
- People in government may not be familiar with jargon and technical terms that are commonly used in your sector, so take care to avoid using industry-specific terminology.
- Government representatives may need to follow specific processes before they engage in or make decisions relating to representation and advocacy.



<p><b>Communicating with industry</b></p>	<ul style="list-style-type: none"> <li>• People in industry may not be familiar with how health and community services operate; it might be useful to describe your role and the overall goals of your organisation.</li> <li>• People in industry may have preferences regarding communication methods; for example, they may prefer you to call them on the phone to talk about an issue rather than sending them an email.</li> <li>• Make sure written communications are logical and clear; it may be best to begin with the key points, such as what you want people to do, and then provide background information.</li> </ul>
<p><b>Communicating with community groups</b></p>	<ul style="list-style-type: none"> <li>• Use plain language when communicating with community groups, as this will help to ensure the information is accessible to people from diverse backgrounds.</li> <li>• Invite feedback, questions and comments. Not only can this provide you with valuable information, but it can also help to generate a sense of inclusion and belonging in the community.</li> <li>• Consider methods of communication that are less formal, such as a roundtable discussion. More formal methods of communication may be intimidating to some community members.</li> <li>• Consider the communication needs of people attending a presentation, such as use of <b>assistive technologies</b> or access and seating arrangements.</li> </ul>

**Assistive technology**  
Technology that enables a person to maintain or improve their capability of performing a task.

Sources: [https://vcoss.org.au/wp-content/uploads/2018/06/Communities\\_Taking\\_Power\\_FINAL\\_WebUpload.pdf](https://vcoss.org.au/wp-content/uploads/2018/06/Communities_Taking_Power_FINAL_WebUpload.pdf)

For more information about plain language see: [aspirelr.link/plain-language](https://aspirelr.link/plain-language)

## Effective communication tips

For communication to be effective, the person delivering the information needs to be clear, and the person receiving the information needs to understand what is being related.

<p><b>Communicate effectively via email</b></p>	<ul style="list-style-type: none"> <li>• Don't leave the subject line blank.</li> <li>• Be clear and concise.</li> <li>• Clarify what you want the recipient to do.</li> <li>• Avoid informal language and emoticons.</li> <li>• Check the tone of your email and avoid ambiguity.</li> <li>• Check spelling, punctuation and grammar before you hit send.</li> </ul>
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<b>Communicate effectively in writing</b>	<ul style="list-style-type: none"><li>• Use short sentences.</li><li>• Cut out unnecessary words.</li><li>• Do not use long words when a shorter word can be used.</li><li>• Be precise – avoid vague terminology such as ‘the current circumstances’.</li><li>• Avoid ‘flowery’ language.</li><li>• Where appropriate, use bullet points so information is easy to read.</li><li>• Ask someone else to read over the work and make suggestions.</li></ul>
<b>Communicate effectively in an oral presentation</b>	<ul style="list-style-type: none"><li>• Speak clearly and project your voice.</li><li>• Use appropriate body language and gestures.</li><li>• Face the group you are speaking to.</li><li>• Write clearly and legibly if using a whiteboard or smart board.</li><li>• Have a clear objective or outcome to your communication.</li><li>• Check and set up technology before the presentation and test that it works as required.</li></ul>
<b>Communicate effectively in a videoconferencing call</b>	<ul style="list-style-type: none"><li>• Mute your microphone when you are not talking and ask others to do the same.</li><li>• Keep your camera on, unless you have bandwidth problems.</li><li>• Keep the call to, at the most, 30 minutes.</li><li>• Make sure you have a good quality web camera and microphone.</li><li>• If multiple people are attending, an agenda can help keep a videoconferencing call on track.</li><li>• If you are displaying content, for example using slides, make sure attendees can still see your face while you are talking.</li></ul>

Sources: <https://www.forbes.com/sites/bryancollinseurope/2020/04/22/tips-for-video-conference-newbies/>  
<https://www.mindtools.com/CommSkill/EmailCommunication.htm>

## Promoting purpose and objectives

**In addition to learning about effective communication, it is useful to know something about effective promotion of an idea.**

If you can effectively promote the purpose and objectives of your representation, key people are more likely to support what you are trying to achieve.



Here are some steps you can take to effectively promote your ideas and point of view:

<b>Begin with the familiar</b>	<ul style="list-style-type: none"> <li>• Begin with a point that everyone is familiar with. This sets a positive tone for the communication.</li> </ul>
<b>Select the most appropriate tone</b>	<ul style="list-style-type: none"> <li>• Tone is the mood or attitude suggested by your language and behaviour.</li> <li>• Certain tones are always inappropriate, including mocking and sarcastic tones and forcing your ideas onto others.</li> <li>• The safest tone is calm, objective and courteous.</li> </ul>
<b>Look at your audience</b>	<ul style="list-style-type: none"> <li>• If you are communicating to a group, look around the room; if you need to look at your notes, be brief.</li> </ul>
<b>Speak loudly and express yourself clearly</b>	<ul style="list-style-type: none"> <li>• If you are communicating verbally, avoid mumbling, whispering or slurring your words.</li> </ul>
<b>Pay attention to your body language</b>	<ul style="list-style-type: none"> <li>• If you are communicating in person, stand straight and use gestures freely and in a natural manner.</li> <li>• Avoid body language that might indicate defensiveness.</li> </ul>

Sources: The art of thinking: A guide to critical and creative thought (2004) by Vincent Ryan Ruggiero.  
<https://www.skillsyouneed.com/present/presentation-tips.html>

## Example

### Communicate and promote purpose and objectives

Ciaran 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.

Ciaran has a good idea of how many people will attend. He has set up the room with chairs for the attendees and other speakers, and an area at the front where people can stand to speak. He has prepared a one-page summary of the work he and the key stakeholders have done so far, and at the top he has clearly written the objectives and purpose of the group and what they hope to change/achieve.



## Practice Task 9

### Question 1

Provide three examples of communication methods for promoting the purpose and objectives of representation to key people.

### Question 2

Identify three key factors that will affect which communication methods to choose.

### Question 3

List three things that you can do to help ensure effective communication of your ideas and points of view.

# 3B

## Promote and facilitate collaborative planning and action

**Collaboration involves people with diverse skills and experience working together to accomplish common goals.**

When people and organisations collaborate, they can draw on their combined expertise and resources. Collaborating with key people and like-minded organisations can strengthen advocacy and representation efforts.

Collaboration between groups and organisations during advocacy and representation processes also demonstrates their commitment to an issue or cause. Additionally, it can raise awareness of the cause with decision-makers and the general community.

To understand what collaboration is, it is useful to compare it to other types of working relationships, such as cooperation.

Collaboration is not the same as cooperation because it often involves tough decisions and trade-offs. Imagine, for example, that you are working with a team of people to achieve a specific goal and there are a range of tasks that need to be completed to achieve that goal.

- **Cooperation:** One member of the team decides that the first task to be completed is community consultation and you cooperate by offering to assist with the consultation process.
- **Collaboration:** One member of the team argues that the first task should be community consultation whereas another argues that the first task should be an internal brainstorming session. You, and other members of the team, give your views on what the first task should be. Following a group discussion you collectively decide to undertake community consultation first, so long as an internal brainstorming session can be held soon after.

Collaborative planning and action could involve other services, government, students or community members. Here are some examples of different types of collaboration:

Youth project	<ul style="list-style-type: none"><li>• <b>Collaboration:</b> A youth service collaborating with multimedia students at the nearby university</li><li>• <b>Goal:</b> Develop a website and online petition to promote the interests of local young people living with disabilities</li></ul>
Dual issues project	<ul style="list-style-type: none"><li>• <b>Collaboration:</b> A mental health service collaborating with an alcohol and other drugs service</li><li>• <b>Goal:</b> Lobby for funding for clients with both mental health and AOD issues</li></ul>



Multicultural project	<ul style="list-style-type: none"><li>• <b>Collaboration:</b> A multicultural centre collaborating with local ethnic associations</li><li>• <b>Goal:</b> Promote a positive community view of immigration and the benefits of multiculturalism</li></ul>
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### Collaboration principles

To accomplish shared goals, collaboration requires participants to work together according to a set of principles:

- **Motivation:** seeking to gain consensus.
- **Participation:** each person actively participates.
- **Mediation:** participants negotiate and strive to find a middle ground.
- **Reciprocity:** participants share information with each other.
- **Reflection:** participants think deeply and consider alternatives.
- **Engagement:** participants engage in problems and solutions, rather than adopting a wait-and-see approach.
- **Accountability:** the participants are accountable to each other and to the business.

Here are some of the benefits of collaboration for advocacy and representation:

- Combining the expertise and resources of multiple people and organisations can increase the effectiveness of representation and advocacy efforts.
- When multiple prominent people and organisations are involved in advocacy it can increase the visibility of a cause or issue.
- Working in a collaborative manner may increase funding opportunities; many funding bodies look favourably on collaborative projects.
- Collaborations can help to establish ongoing relationships with key people and organisations. This can be useful for future advocacy and representation efforts.

### Collaborative planning

It is important to establish the roles and responsibilities of each individual or organisation during the planning stages of a collaborative project. For example:

- Who does what; for example, who speaks to the media?
- Who is responsible for each part of the representation; for example, strategies or specific actions?
- What resources will each member bring to the representation; for example, financial or staffing resources?



## Promoting and facilitating collaboration

When people work in a collaborative way, they welcome and respect each other's viewpoints and demonstrate a willingness to explore different ideas.

The benefits of collaboration to the process of representation and advocacy are undeniable. Therefore, your ability to promote and facilitate collaborative ways of working is critical to your role as someone who provides representative services. Here are some examples of how you could promote and facilitate collaboration:

- Encourage people to ask questions and explore ideas.
- If an idea seems unconventional do not dismiss it out of hand; look for ways to explore it further.
- Give people opportunities to debate ideas and encourage friendly, constructive debate.
- Make sure everyone has a voice by giving people opportunities to communicate their viewpoints in different formats; for example, face-to-face, via email or other online collaboration tools.
- Give people time to articulate their ideas. Do not discount an idea because someone is having difficulty explaining their concept.
- Rather than assigning roles to people, work as a group to determine who will do what.
- Establish the goals of the collaboration and remind people of those goals when motivation is waning, or if the group has lost its way.
- Model a calm approach when obstacles and problems arise. This will encourage others to persevere with the goal, rather than giving up.

Sources: <https://blog.jostle.me/blog/6-collaboration-skills-and-how-to-foster-them>  
<https://hbr.org/2019/01/how-to-unlock-your-teams-creativity>  
<https://hbr.org/1998/09/how-to-kill-creativity>

### Video: Encouraging collaboration

This video features Linda Hill, a Harvard professor, talking about how to encourage collaboration in the workplace: [aspirelr.link/ted-collaboration](https://aspirelr.link/ted-collaboration)





## Example

### Promote and facilitate collaborative planning and action

A community legal service represents a few clients with issues relating to substance misuse who need legal support. The organisation decides to promote the legal support needs of a group of clients who have disabilities resulting from AOD use. Senior workers, led by Samara, realise they lack expertise in the AOD sector. They decide to approach two AOD support organisations, one who provides services to people with disabilities, to work collaboratively on this representation.

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

## Practice Task 10

### Question 1

Briefly outline at least three principles of collaboration.



**Question 2**

Provide at least three examples of ways to promote and encourage collaboration in a group.

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# 3C

## Identify potential areas of conflict and implement strategies to address them

**When people work together conflict and disagreements are common. It is important to understand conflict and remember that healthy disagreements can be helpful.**

Healthy conflict is constructive and respectful. People may disagree but they do not insult, belittle or attack each other. Healthy conflict can push a project or initiative forward and lead to more effective decision-making.

Unhealthy conflict is driven by feelings such as jealousy, revenge and spite. It promotes division and has a negative impact on team members' motivation and productivity.

Unhealthy conflict during the representation or advocacy process may stall progress, lead to the disintegration of an alliance, or may even cause the process to fail.

### Understanding conflict

**Conflict is defined as a disagreement or struggle between people with different or opposing needs, ideas, beliefs, values or goals.**

Conflict can occur when people disagree or their objectives or values are incompatible. Conflict can also occur when roles, objectives and strategies are not clearly defined and agreed to, or when the objectives or priorities of one or more of the members change.

Possible reasons for conflict
• People have different agendas, goals or priorities.
• People have different beliefs, values, cultures, skills or knowledge.
• The people who are being represented have different priorities from the people representing them.
• People change their priorities during a process.
• One party is not contributing the same amount of effort or resources as another party.



## Identify and address areas of potential conflict

**It is important to identify potential areas of conflict, and develop strategies to deal with them, before they become an issue.**

Recognising possible areas of conflict at the beginning of the representation process can make a significant difference. It allows you to put preventative strategies in place to avoid or reduce conflict during the process.

When you identify potential areas of conflict, it is important to consider the people and organisations involved, their interests and values, and the resources required to undertake the representation or advocacy process.

For example, service providers may have limited resources which can lead to conflict when organisations collaborate. In this situation it is useful to address the limited resources early in the representation process and agree on how they will be distributed.

Here are some other steps you can take to address potential areas of conflict before they arise:

<p><b>Establish and revisit the purpose and objectives of the task</b></p>	<p>A clearly defined purpose and objectives helps keep people on track and provides a focus for the collaboration. When there are disagreements, revisiting the purpose and objectives can provide a clear direction forward.</p>
<p><b>Ensure everyone has a voice</b></p>	<p>One way to prevent or decrease the likelihood of conflict is to make sure everyone has a voice. Establishing some basic principles for meetings, discussions and consultations, such as being respectful and open-minded, can help to ensure people with different viewpoints and perspectives are heard.</p>
<p><b>Establish a transparent decision-making process</b></p>	<p>The decision-making process should be clearly communicated so everyone understands how decisions will be made.</p> <p>A basic decision-making process model may include the following steps:</p> <ul style="list-style-type: none"> <li>• Identify the problem or opportunity.</li> <li>• Gather the information.</li> <li>• Analyse the situation.</li> <li>• Develop options.</li> <li>• Evaluate options and choices.</li> <li>• Select a preferred option.</li> <li>• Act on the decision.</li> </ul>



## Models of negotiation

**Negotiation is the method people use to settle differences.**

When you negotiate with someone, you make a compromise or agree to a course of action without resorting to an argument.

The principles that are key to successful negotiation are:

- fairness
- the desire for mutual benefit
- the desire to maintain positive relationships.

The following is a summary of four models of negotiation:

Win–Win	<ul style="list-style-type: none"> <li>• Everyone in the negotiation wins because everyone gets what they want.</li> <li>• This is the ideal model as everyone benefits and no-one loses.</li> </ul>
Win–Lose	<ul style="list-style-type: none"> <li>• You win, the other party loses.</li> <li>• After negotiation, one party wins because they get what they want, while the other party loses because they do not. Therefore, one party benefits while the other is dissatisfied.</li> </ul>
Lose–Win	<ul style="list-style-type: none"> <li>• You lose, the other person wins.</li> <li>• After negotiation, one party wins because they get what they want, while the other party loses because they do not. Therefore, one party benefits while the other is dissatisfied.</li> </ul>
Lose–Lose	<ul style="list-style-type: none"> <li>• Everyone in the negotiation loses because no-one gets what they want.</li> <li>• Neither party accepts the other’s perspective or is prepared to compromise.</li> </ul>

You should always aim to work towards win–win negotiation outcomes. 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 believe to be 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, Propose, Agreement, Close) is a commonly used negotiation model that can be used to support a team to work through a conflict or potential conflict.



Each stage is described below, using the previous example of regional and metropolitan services negotiating about funding allocations:

### Rapport

A comfortable working relationship is developed between the parties.  
The services know each other from attending 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, with food and drinks provided, at the beginning of the process.

### 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 state why they should receive the funding they are seeking.

### Propose

Each party proposes their best idea.  
Have each party put forward 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 reasons.

### Agreement

The parties reach a decision 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, 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 receives a copy of the details.



## Example

### Identify potential areas of conflict and implement strategies to address them

A group of disability services agrees on the need for increased funding for respite services. There is, however, conflict between them regarding where the additional funding should be spent. Those working in regional services feel they should receive more funding because they have fewer available services; whereas those working in metropolitan services feel they should receive more funding because they have a larger client population.

Freya, who is leading the representation, needs to keep both parties focused on the fact that the purpose and objective of the representation is to increase funding for all the organisations involved. To try and avoid an escalation of the conflict, Freya reminds the parties that the objective of this part of the negotiation is to ensure that both regional and metropolitan services are given an opportunity to voice their concerns. Once this has happened, the next objective is to agree how to distribute the funding in a way that is acceptable to everyone.

## Practice Task 11

### Question 1

Provide two examples of when conflict may occur during representation.



**Question 2**

Outline one positive and one negative aspect of conflict when it arises in a negotiation situation.

**Question 3**

List four models of negotiation.

**Question 4**

Outline the steps in the RADPAC model of negotiation.

# 3 D

## Work with organising committees and boards of management to maximise effectiveness

**You may need to work with committees or boards of management when representing the interests of service users.**

The committees and boards you work with may be composed of people from either inside or outside your own organisation.

When working with committees or boards you need well-developed communication, negotiation and management skills. These skills will help you establish professional working relationships, gain support from key people and ensure that projects run smoothly.

### The committee's role

It has been decided that one strategy to be used to represent the interests of a client group is to organise a march through the city followed by a rally outside Parliament House.

Some of the people involved in representing the client group form a committee to organise the march and report back to the main group.

The organising committee is responsible for:

- following up on specific requirements such as liaising with the police and arranging permits
- organising promotional materials
- contacting the media
- informing decision-makers about the event
- arranging other practicalities such as placards and banners.

### Your role

In your role, you might be a member of the organising committee or confer with them regularly to see what support they need and follow-up on specific requirements, such as progress reports.

Part of your job may be to ensure the organising committee consists of a cross-section of the people involved in the representation process to ensure all views are represented.



## 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 of an organisation, they are often responsible for approving strategies and plans. They may also be responsible for other tasks such as speaking to the media.

The following table provides some further information about the role of a board of management, and the role and required skills of a representative working with a board of management.

<b>Board's role</b>	<p>The board of management's role in a representation process may be to:</p> <ul style="list-style-type: none"> <li>• approve all or some aspects of the representation service; for example, budgets or press releases</li> <li>• enter into collaboration agreements</li> <li>• approve reports to funding bodies and stakeholders.</li> </ul> <p>For example, a worker might approach the board of another organisation with a proposal to collaboratively advocate on behalf of a client group. The board may discuss this with the worker and then agree to work on a collaborative agreement.</p>
<b>Role of representative</b>	<p>You may need to work with boards to:</p> <ul style="list-style-type: none"> <li>• gain authorisation to proceed with a representation service</li> <li>• ask for support for the representation</li> <li>• propose a collaborative relationship</li> <li>• gain permission to speak to the media or have a board representative speak to the media to promote the representation</li> <li>• report on the progress or outcomes of the representation service.</li> </ul>
<b>Required skills</b>	<p>To effectively work with boards of management, you need to understand how the board works and the roles of each member.</p> <p>You also need to have skills in:</p> <ul style="list-style-type: none"> <li>• communication and presentation; including the ability to clearly propose actions, ask for assistance, and explain the representation process and strategies</li> <li>• consultation</li> <li>• planning</li> <li>• report writing and feedback.</li> </ul>



## Example

### Work with organising committees and boards of management to maximise effectiveness

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

## Practice Task 12

### Question 1

Briefly explain the role and responsibilities of an organising committee.



**Question 2**

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

**Question 3**

List two examples of what your role may involve when working with a board of management.



## Summary

- Identify individuals, communities and organisations that can support the representation, and develop effective alliances with them.
- Collaborating with key people, or with other like-minded organisations or groups through an alliance, can strengthen the actions being taken.
- Identifying potential areas of conflict and putting in place strategies to address these conflicts is an important part of the representation process.
- Conflict may occur if key people and stakeholders have different agendas, goals, priorities, beliefs, values, cultures, skills or knowledge.
- Unhealthy conflict disrupts the progress of representation, is characterised by a lack of respect and is driven by emotions such as jealousy and spite.
- You must clearly define and promote the objectives and desired outcomes of the representation service so everyone understands the purpose and goals of the representation.
- 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

### Part A

1. Briefly outline why it is important to communicate organisational purposes and objectives to key stakeholders and decision-makers.

2. Briefly outline the four models of negotiation.



## Part B

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

### Case study

Marina coordinates a small community centre offering day programs for a range of community groups. There are a few programs available to people living with intellectual disabilities. The people who attend these programs have indicated that they would like additional opportunities at the centre, but there are no resources to provide these. They discuss the idea that Marina should promote their interests to increase the number of programs on offer.

Marina is the only paid worker at the centre, and there is a lack of available resources to represent the group's interests effectively. She decides she needs alliances to support them and gets permission from the board of management to look for other organisations in the local area providing similar services. She identifies two, including the local council. During her consultation with clients, she learns about an advocacy service that may be willing to help. Marina approaches the council and the advocacy service to discuss how they can collaborate to improve services for all their clients. They meet over several months to decide on objectives, identify the decision-makers and the actions to be taken.

Ultimately, an agreement is developed between the local council, the community centre, the advocacy group and another disability service provider who can provide a support worker to accompany any of their clients who want to attend the community centre's programs.

1. List the different people/groups Marina promotes the issues to and collaborates with.



- 2. Identify at least one potential area of conflict and suggest strategies Marina can use to address this.**

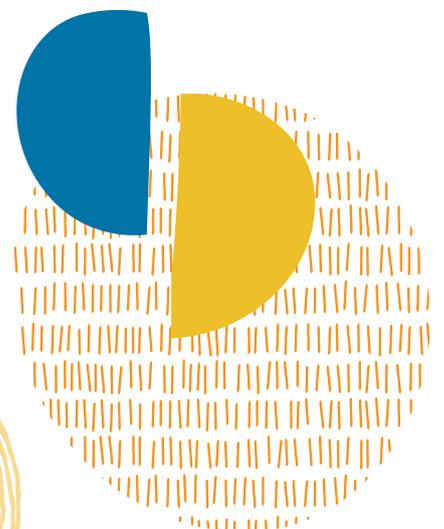
- 3. Outline the advice you would give Marina to maximise the effectiveness of her work with the board of management.**





## Topic 4: Evaluate the effectiveness of strategies

- 4A Analyse actual work outcomes and document and report against agreed objectives and priorities
- 4B Implement adjustments to strategy according to evaluation



# 4A

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

**Assessing the effectiveness of the strategies and actions of the representation is an important part of providing a representation service.**

In your role as someone who provides representation services you must review what worked, what did not work, and the impact of the representation. This information can be used to adjust and improve your organisation's representation services going forward.

To determine effectiveness you will need to analyse the outcomes of the representation against the objectives and priorities that you collectively agreed upon during the planning stages.

### Collecting data on outcomes

**Outcomes are things that happen, or changes in conditions or behaviour, that indicate progress towards a goal.**

Outcomes are different to outputs. Outputs are actions that are taken as part of a project.

For example, the goal of your representation is to raise awareness about youth detention laws. In collaboration with the community you are representing, you have delivered four educational workshops and gathered 400 signatures on a petition. These are actions that have been taken but this doesn't inform you about whether you are progressing towards your goal of raising awareness about youth detention laws. It tells you what was done, but tells you nothing about the impact of the actions.

Outcomes are what has happened as a result of the strategies used in the representation process. These might include:

- improved awareness of an issue
- increased commitment to an issue
- the creation of a new policy
- increased funding for a service
- additional services being offered.



## Analyse outcomes

Once you have collected data, you need to analyse it to determine what it suggests about events or changes in conditions or behaviour that have occurred because of your representation.

For example, you are representing the interests and needs of young homeless people in a Local Government Area (LGA). Part of this initiative involved an awareness-raising campaign within the LGA. To determine the impact of the awareness-raising campaign you sent out a survey to people living in the LGA before the campaign began and again six months after the campaign began.

The survey results might show the percentage of people who:

- were exposed to information about youth homelessness during the representation period
- accessed the campaign website designed to raise awareness of youth homelessness
- report having a better understanding of youth homelessness.

This data gives you details about the outcomes of the awareness-raising campaign. For example, there has been a 30% increase in the percentage of people who report having a better understanding of youth homelessness. This suggests that increased awareness of the issue among the target audience has been an outcome of the campaign.

## Outcomes, objectives and priorities

**The outcomes of the representation should be documented against the agreed objectives and priorities.**

During the consultation with the person or people you are representing and with other key stakeholders the objectives and priorities of the representation should be decided and agreed. As with all collaborative processes, this involves working together to come to a mutual agreement.

Here are some examples of the objectives of different representation initiatives, outcomes of the representations and evidence demonstrating the outcomes have been achieved:



Project 1
<p><b>Objective:</b> To obtain \$10,000 in funding from local government by October 2022 to fund the Aboriginal and Torres Strait Islander peoples disability project.</p> <p><b>Outcome:</b> Local government granted \$15,000 to fund the Aboriginal and Torres Strait Islander peoples disability project.</p> <p><b>Evidence:</b> A signed funding contract is received from the local government for the disability project.</p>
Project 2
<p><b>Objective:</b> To ensure a group of clients in residential care receive culturally appropriate meals from the relevant service provider.</p> <p><b>Outcome:</b> All clients report that they are now receiving culturally appropriate meals.</p> <p><b>Evidence:</b> Data collected via interviews with clients over a two-week period.</p>
Project 3
<p><b>Objective:</b> To raise awareness among young parents living on the Central Coast about the impact of domestic and family violence on young children of 5 years and under.</p> <p><b>Outcome:</b> Young parents living on the Central Coast report an increased understanding of the impact of domestic and family violence on young children.</p> <p><b>Evidence:</b> Survey data indicating a 35% increase in awareness of the issue among the target audience.</p>

## Documentation and reporting

Documenting and reporting on the outcomes of the representation against the mutually agreed objectives and priorities helps key people understand the impact of the representation.

By documenting and reporting upon outcomes in this way, it is easy for key people, such as boards of management, funding bodies, community members and other agencies, to see the impact of the representation.

The outcomes of the representation might not always match the objectives and priorities. For example, there might not be a change in policy, or awareness might only be increased in one segment of the target audience.

Regardless of whether the objectives and priorities of the representation have been achieved, you still need to document and report upon the outcomes.

Here is a summary of items to consider when documenting and reporting upon outcomes. These overlap with information provided in a previous section about providing progress or evaluation reports and considering organisational requirements that may need to be followed:



<b>Documenting outcomes</b>	<p>When documenting outcomes you must consider client confidentiality, privacy and organisational policies and procedures.</p> <p>How you document the outcomes depends on the resources you have available and the outcomes you have measured.</p> <p>Find out whether you need to use a specific template to report the outcomes of your representation.</p>
<b>Reporting outcomes</b>	<p>Reporting outcomes is part of the accountability process. It allows the people who have participated and supported the representation process to celebrate successes, identify mistakes and propose improvements for future representations.</p> <p>Not reporting outcomes may lead to a loss of funding, a loss of commitment to future representation processes and could also damage trust.</p>
<b>Report formats</b>	<p>Tailor the report to the audience and outcomes being discussed. For example, you may use:</p> <ul style="list-style-type: none"> <li>• a combination of music and video recorded during actions to report to a group of young people who are clients of an organisation</li> <li>• a formal written report for a board of management or funding body</li> <li>• tables and charts to present numerical data, such as the proportion of people from CALD backgrounds</li> <li>• a verbal report to a large group of key people and stakeholders.</li> </ul>

## Analysing the process

**Just as it is important to analyse the outcomes of the representation process, it is also important to find out why the processes that were followed were or were not successful.**

Understanding why a representation was or was not successful can help you understand what needs to be changed to improve the representation services your organisation provides in the future.

For example, you worked with a group of people to bring about a policy change relating to home-based care for elderly people. You lobbied decision-makers who seemed receptive to the issues faced by elderly people living independently. You, and others, represented the interests of this group of clients by presenting at a parliamentary inquiry. Everything seemed to go well but, despite this, after six months of hard work the policy remains unchanged.



To better understand why the representation was unsuccessful you should analyse key parts of the process. Some things to look at include the effectiveness of:

- the strategies used
- the alliances formed
- the consultations undertaken.

The following table outlines how to evaluate the effectiveness of strategies, alliances and consultations.

Strategies
<p>Examine each strategy individually. Was each one effective? Perhaps one strategy was effective, and another wasn't. Why? What could be done differently next time?</p>
Alliances
<p>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 these skills?</p>
Consultation
<p>You also need to evaluate the effectiveness of the consultation process used through the representation:</p> <ul style="list-style-type: none"> <li>• Were important key people consulted?</li> <li>• Should additional people have been consulted?</li> <li>• Was too broad a selection of people consulted?</li> <li>• Was the consultation process effective?</li> <li>• How could it have been more effective?</li> <li>• What methods worked best?</li> <li>• Should you have had clearer objectives for the consultation?</li> </ul>

## Evaluating your own performance

**It may be useful to reflect upon your own role in the success, or otherwise, of the representation process.**

You do not need to report upon this process to anyone, but it can be a useful way of identifying areas for improvement for your own career progression.



Here are some tips to help you evaluate your performance.

<b>Set aside time</b>	You need to set aside adequate time to reflect upon your performance. You can use this time to reflect upon any feedback you have received from people you have worked with during the representation process.
<b>Use self-reflection tools and techniques</b>	Various tools and techniques are available to assist with self-reflection. For example, the Johari Window is a technique that helps people to improve self-awareness by clarifying what they know about themselves and how they appear to others.
<b>Review organisational objectives</b>	How have your efforts and achievements contributed to your company's objectives? Reflecting on this question will help you get a better understanding of the value of your work.
<b>Identify next steps</b>	Most of the work of self-evaluation involves looking back in time: what have you achieved, what could you have done better? However, self-evaluations also provide you with an opportunity to set some new goals and think about the future. How could you apply the skills you have learned? What steps will you take to address your weaknesses?

Sources: <https://www.indeed.com/hire/c/info/self-evaluation-examples-and-tips>, Daniel Goleman. What Makes a Leader? On Leadership (HRB's 10 Must Reads). Harvard Business Review Press, Boston.

For more information about the Johari Window see: [aspirelr.link/li-johari-window](https://aspirelr.link/li-johari-window)

## Example

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

A carers' organisation is providing representation services to 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 their 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 analyses the data she has collected to determine the outcomes of the representation. The data indicates an increased awareness of the issues faced by young carers in two of the target local government areas.

Key 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

### Question 1

Briefly outline why the outcomes of a representation should be compared to the intended objectives.



**Question 2**

Suggest two reasons why representation outcomes must be documented and reported.

**Question 3**

Provide one tip for ways to evaluate the effectiveness of strategies, alliances and consultations.

# 4B Implement adjustments to strategy according to evaluation

**After analysing the outcomes, use the results to inform strategies for this and future representations.**

If you are representing a client or clients over an extended time, you might undertake multiple periodic evaluations to assess the impact of the representation and of individual strategies. The data from these evaluations may be used to adjust the strategies you are using.

If you have collected data on a process that has finished, the evaluation results can be used to improve future representation processes.

## Adjustments to strategies

**Analysing outcomes and adjusting strategies is part of a continuous improvement process.**

Even when the representation is successful there may be things you can learn about using resources in a more efficient way.

The following table suggests areas of the representation process that can be reviewed, evaluated and adjusted, gives examples of ineffective strategies and provides suggestions for improvements:

<b>Consultation</b>	<p><b>Situation:</b> Inadequate consultation led to less support from key people because they did not feel as if they were part of the process.</p> <p><b>Improvement:</b> Identify all key people and consult regarding role, conditions and level of support at the beginning of the representation.</p>
<b>Communication</b>	<p><b>Situation:</b> Analysis indicates that younger stakeholders did not read contact emails so were not as involved as they could have been.</p> <p><b>Improvement:</b> Consider SMS or other messaging platform and social media to communicate with younger stakeholders; consult with them to evaluate success.</p>
<b>Negotiation</b>	<p><b>Situation:</b> Poor communication and negotiation skills of a key person involved in the alliance led to some parties disengaging.</p> <p><b>Improvement:</b> Provide communication and negotiation skills training to all staff providing representation services.</p>



<b>Conflict</b>	<b>Situation:</b> Unhealthy conflict between members of the alliance resulted in major deadlines being missed. <b>Improvement:</b> Put conflict management strategies in place during the planning stages of representation.
<b>Action</b>	<b>Situation:</b> A march organised as part of a representation process does not attract many participants. <b>Improvement:</b> Promote the representation action more widely; for example, in the media, to other organisations, to key people and stakeholders.

## Implement adjustments

### **Suggestions about ways of improving representation services are often made as part of the reporting process.**

When you make suggestions about adjustments to strategies, these may need to be discussed and reviewed by your manager or other key people in your organisation.

Here are some examples of adjustments made to representation services resulting from an evaluation:

Adjustments made after an evaluation of representation services
<ul style="list-style-type: none"> <li>Using different or more appropriate strategies; for example, direct action such as marches if lobbying has not worked</li> </ul>
<ul style="list-style-type: none"> <li>Changing the composition of the alliance by adding or removing individuals, groups or organisations to increase effectiveness</li> </ul>
<ul style="list-style-type: none"> <li>Consulting with additional or different key people</li> </ul>
<ul style="list-style-type: none"> <li>Changing the reporting or accountability process by amending the format and regularity of progress reports or by reporting to different stakeholders</li> </ul>
<ul style="list-style-type: none"> <li>Requesting changes to protocols that have made consultation or alliances difficult or slow to execute</li> </ul>
<ul style="list-style-type: none"> <li>Suggesting more training or identifying skills gaps in staff to improve the service provided to clients</li> </ul>



## Example

### Implement adjustments to strategy according to the evaluation

Michaela, who is leading a representation for her organisation, met with a group of influential decision-makers to promote the interests of her clients. When analysing the outcomes she realises that while her team met 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 to generate support before meeting with decision-makers.

Michaela decides to approach other relevant organisations to form an alliance to increase the impact of the representation action.

## Practice Task 14

### Question 1

Briefly outline how an evaluation and review can lead to improvements for future representations.



**Question 2**

Match each ineffective strategy to its possible improvement.

Inability to deal with conflict	Seek input from a more diverse group of stakeholders
Lack of action	Provide a clearer description of the purpose and objectives of the representation at the beginning of the process
Ineffective consultation	Seek a negotiated compromise rather than a win-win situation
Ineffective communication	Set ground rules for respect and codes of behaviour at the beginning of the process
Lack of agreement	Set timelines for the achievement of the objectives

**Question 3**

After an evaluation of representation services has taken place, provide three examples of adjustments that could be made.



## Summary

- Providing a representation service involves assessing and evaluating the effectiveness of the strategies and processes that were used.
- Information about the effectiveness of strategies and processes can be used to adjust and improve an organisation's representation services.
- Outcomes are different to outputs. Outputs are actions that are taken as part of a project whereas outcomes are what has happened as a result of the strategies used in the representation process.
- The outcomes of representation should be documented against the objectives and priorities of the representation.

# Learning Checkpoint 4

## Evaluate the effectiveness of strategies

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

### Case study

Western Care is a local community service provider, offering home and community care and youth services. Maya, a community services worker at Western Care, facilitates a program for mothers who are under 21 years old. She discusses her concerns about these young mothers and their children with you. While most of the mothers do their best to parent effectively, Maya is worried because many do not seem to understand the basic nutritional needs of young children. They are also finding it difficult to manage their children's behaviours of concern, such as tantrums.

After talking to Maya, you talk to the young mothers. 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 the young women learn how to access appropriate services and achieve an increase in funding to pay 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 the young women learn how to access appropriate services
- For young people to participate in representation services
- To achieve an increase in funding to pay for an educational program for young parents
- To implement a new program to meet the identified concerns

The representation service's chosen strategy was a paper-based petition. Unfortunately, the petition did not get the desired number of signatures as only a few 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 chosen strategy of using a petition to raise awareness of the issue.**



# Glossary

## **Advocate**

An individual who speaks up for a person to defend their rights.

## **Assistive technology**

Technology that enables a person to maintain or improve their capability of performing a task.

## **Consent**

To give permission or to agree to something.

## **Duty of care**

A moral or legal obligation to ensure the safety and wellbeing of other persons.

## **Guardian**

A person who has the legal authority to make decisions for another person.

## **Human rights**

Fundamental rights and freedoms that apply to all people, setting norms for standards of human behaviour.

## **Person-centred approach**

Providing tailored support for each person and taking time to learn about their individual preferences, needs and goals.

## **Strengths-based approach**

Recognises that all individuals are resourceful and resilient experts in their lives, and can progress in a way that enhances their quality of life.

