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## Characteristics of Advocates: An Exploration of Skills and Skill Development Used in the Performance of Advocacy Work in the Mental Health Profession

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LOYOLA UNIVERSITY CHICAGO

CHARACTERISTICS OF ADVOCATES: AN EXPLORATION OF SKILLS AND  
SKILL DEVELOPMENT USED IN THE PERFORMANCE OF ADVOCACY WORK  
IN THE MENTAL HEALTH PROFESSION

A DISSERTATION SUBMITTED TO  
THE FACULTY OF THE GRADUATE SCHOOL  
IN CANDIDACY FOR THE DEGREE OF  
DOCTOR OF PHILOSOPHY

PROGRAM IN COUNSELING PSYCHOLOGY

BY

LYDIA R. WIEDE

CHICAGO, IL

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For my children Andreas, Peter and Elisabeth  
and my husband Bill, with much love

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## CHAPTER I

### INTRODUCTION

*Each time a man stands up for an ideal, or acts to improve the lot of others, or strikes out against injustice, he sends forth a tiny ripple of hope, and crossing each other from a million different centers of energy and daring, those ripples build a current which can sweep down the mightiest walls of oppression and resistance.*

*Robert F. Kennedy  
Capetown, June 6, 1966*

The 1960s were a politically and socially tumultuous time in the United States. Marches, demonstrations, sit-ins and walkouts were measures taken to bring change to the status quo. Many of these actions were spontaneous and loosely organized while others were well-orchestrated events with specific timing and intended goals. Often, these actions took place to produce change that had a direct effect on the individual participant. In many cases, individuals stood up to injustices and advocated on the behalf of others without the condition of personal gain.

The quotation from Robert F. Kennedy made during those troubled times still stands today as a call for advocacy and justice on behalf of the marginalized, victimized, and the brutalized. One group of professionals attempting to respond to that call is the field of mental health workers. Social workers and counselors have a long tradition of supporting social justice issues. For decades, psychologists have heard their leaders in the

profession champion social justice causes and call on colleagues to accept the role of advocate as part of his or her professional identity.

This chapter will address the meaning of advocacy, the historical trends of advocacy within the field of psychology, and the obstacles faced by potential advocates. That information will help inform the argument for developing a skill set necessary for competent advocacy in the area of social justice issues.

The interchangeable use of ‘social justice’ and ‘advocacy’ has led some to believe they are the same. Whereas definitions of social justice often refer to the fair and equitable distribution of resources without respect to gender, race, socio-economic class, etc... (Vera & Speight, 2003), advocacy refers to speaking on behalf of someone else or pleading a cause for another often to ensure just treatment (Meyers, Sweeney & White, 2002). The distinction between social justice and advocacy is relevant to this study as this study proposes to examine the skills individuals use to go beyond the understanding of social justice to an active agent for change.

Across mental health professions, social justice is widely touted as essential work. When examining the research in this sphere, it appears that social justice as a foundational value is at the center of the discussion. Conversely, the development and use of advocacy skills, in the promotion of social justice, seems to hover on the fringes of that conversation. Advocacy, it appears, is an afterthought to the process.

There are extensive writings about the goals of social justice, the need for empowering others and the bringing of equality to the marginalized; however, literature addressing the act of advocacy and the steps taken to make social justice happen is

significantly less substantial. In fact, a simple measure of the literature reveals the disparity. Using “counseling psychology” and “social justice” as search terms for the years 2000-2010, *PsychInfo* yielded 1299 articles. At the same time, a similar search for “counseling psychology” and “advocacy” yielded five articles. Based on that search, it appears that advocacy is a topic loosely tethered to the rubric of social justice.

There seems to be a legitimate consensus in the counseling psychology field to pursue social justice causes (Romano & Hage, 2000; Toporek & McNally, 2006; Vera & Speight, 2007). This pursuit must move beyond the mere identification of injustices towards action to facilitate change. Ratts & Hutchins (2009) argue, “social justice has been a rather abstract, philosophical, and theoretical concept in the counseling literature” (p.22). They continue their argument by proposing the *Advocacy Competencies*, adopted by the American Counseling Association (ACA), for the counseling profession are integral to advancing the social justice agenda. In essence, change requires action.

Baluch, Pieterse, and Bolden (2004) have argued that “the inclusion of social action and social justice as integral aspects of how counseling psychologists conceptualize their work is not a new area of emphasis; however, it is yet to be a central aspect of how we see ourselves.”

For psychologists, this seems to compel the profession to take leadership by ensuring that knowledge gained through psychological research and clinical practice provides a foundation for sound social policies (Maton & Bishop-Josef, 2006; Vera & Speight, 2000). Toporek et al. (2006) call for the establishment of counseling psychology

professionals as individual or organizational advocates. These individuals would work to implement institutional changes that promote social justice causes.

The definitions of advocacy are nuanced and plentiful, spanning multiple disciplines. Toporek & Liu (2001) define advocacy for the counseling and psychology profession as “the action a mental health professional, counselor or psychologist takes in assisting clients and client groups to achieve therapy goals through participating in clients’ environments” (p. 387). Another definition of advocacy from the social work discipline states advocacy is a “wide range of individual or collective action on a cause, idea, or policy” (Reid, 2000 as cited in Donaldson & Shields, 2009, p. 84-85). Waterston (2009) describes advocacy as “speaking out on behalf of a particular issue, idea or person” (p. 24), while Baldwin (2003) describes the essential helping strategies associated with advocacy as valuing, apprising, and interceding. Taken as a whole, the consensus seems to conclude that advocacy is purposeful activities that serve to produce change on behalf of individuals and groups. These purposeful actions are targeted efforts towards changing conditions by changing policies and practices.

Throughout the history of counseling psychology, major issues relevant to the profession have changed with the larger culture. The Society of Counseling Psychology, division 17 of the American Psychological Association (APA) was established in 1946. When established, the section was called Division of Personnel and Guidance Psychologists (Heppner, Casas, Carter & Stone, (2000). Although the division was established a half decade earlier, it wasn’t until the Northwestern Conference in 1951 that the Society of Counseling Psychology found its advocacy voice and made political

and social advocacy part of their foundational values (Fouad, McPherson, Gerstein, Blustein, Elman, Helledy, & Metz, 2004). In the six decades since the Northwestern conference, the focus on advocacy work within the division has been inconsistent. In the first three decades of the division's history, the political and social will existed among the membership, and advocacy campaigns emerged. Counseling psychologists participated in political and social advocacy efforts of the time. By the 1980s and most of the 90s, the political winds in the United States, and indeed around the much of the world, had shifted. According to Hall (2005), the times had changed and U.S. President Ronald Reagan stood at the center of calls for personal responsibility (p. 171).

In 2001, there was a noticeable shift in the collective consciousness within APA's Division 17 leadership. These individuals used the Houston APA conference as a forum to reclaim foundational values of justice and equality through the creation of social action groups (McCrae, Bromley, McNally, O'Byrne & Wade, 2004; Meara & Davis, 2004). Once again, the trajectory of the counseling psychology profession was shifting. While conferences in the past (e.g. Boulder) had organized the profession and charted new courses, the 2001 conference served as a call to the professionals of the 21<sup>st</sup> century to take political and social action, to move beyond the status quo, and to establish a new paradigm for the future. In particular, these calls focused on fighting for justice (Toporek, Gerstein, Fouad, Roysicar, & Israel, 2006; Roysicar, 2009).

Year after year, leaders in counseling psychology called for action against oppression, marginalization, and inequities. Speakers inspired, motivated, asked and demanded that the constituents of the organization integrate social justice, advocacy, and

prevention programs into their professional identities. As these calls increased, social justice, outreach and prevention topics became a part of the educational tapestry in some counseling psychology programs. Doctoral training programs found ways to incorporate these critical topics into their existing curriculum and in some cases, developed entirely new courses. Professionals wove these values into their job descriptions and daily practice, securing them into their foundational principles. Even as changes were made to professional identities and training programs, it remains unclear how *advocacy* training and efforts have emerged in the counseling psychology profession.

In their 2009 review of course syllabi from APA approved doctoral training programs, Pieterse, Evans, Risner-Butner, Collins & Mason found that while many of the courses offered training on social justice knowledge and awareness, only 13% of the courses addressed advocacy skills. The implication appears to be that knowledge will foster action even without providing a template that guides students into action. If you know, you must act.

From the earliest days of training, psychologists learned to maintain a professional distance. Doctoral students developed counseling skills, infused with a steady measure of ethical training and boundary development (Pope & Vetter, 2003), while learning to remain thoughtfully detached from their clients; however, if one maintains rigid boundaries, how would it be possible to advocate for a client, a community, the profession, or a national cause? Becoming an advocate presents many professional dilemmas. Consequently, individuals working in the advocacy arena must have a clear understanding of what their roles as advocates are and how to incorporate

those into their professional identities. Vera and Speight (2003) call on counseling psychology professionals to expand their roles and to move towards a social justice advocacy model. They suggest that those wishing to adopt the model into their professional identities “move from a microlevel to a macrolevel analysis of issues” (p. 269).

Advocacy, while simple in definition, is multi-faceted in its implementation. Advocacy exists at many levels. In 2004, Freddolino, Moxley, and Hyduk developed a model of advocacy from two perspectives; those who control the process and those who control the outcomes. Their model split advocacy into two distinct categories: case advocacy and class advocacy. Case advocacy involves assisting individual clients to navigate systems that may be unwieldy or daunting in the pursuit of accessing services. Class advocacy involves efforts to make systemic changes to social systems and public policy.

Historically, the profession has promoted critical issues using advocates. According to Oskamp (2007), psychologists are uniquely qualified to address social concerns and policy issues. Oskamp stresses that psychological principles extend beyond the intrapersonal. He suggests psychology has a significant body of literature with sound empirical data, which can inform the creation of just social policies.

In order to participate in the advocacy process, individuals must overcome both personal and professional obstacles. As is inherent with any activity that positions an individual or agency on one side of an issue, one runs the risk of being labeled a “troublemaker” when engaging in advocacy work (Bemak & Chung, 2008; Waterston,

2009). Additionally, individuals and organizations may find themselves overwhelmed by the inequalities and take on feelings of guilt and shame. As a result, potential advocates may step away from the cause rather than forge a new path in their professional roles (Bemak & Chung, 2008).

Ratts, DeKruyf and Chen-Hayes (2007) illustrate this point in the context of school systems. School counselors wishing to engage in social justice advocacy are likely to encounter resistance to their advocacy efforts from within the system and from the community. Ensuring the advocate is properly informed with the ability to thoughtfully convey the message is critical, lest they fear losing credibility and damaging their professional reputation.

Other professional risks include “professional paralysis” (Bemak & Chung, 2008). Paralysis occurs when a task seems so daunting in its magnitude that it creates uncertainty and even confusion about ways in which to address the injustice(s). This may be especially true for individuals used to high standards and expectations. Taking on significant issues (ex. affordable healthcare) may involve so many agencies and organizations that one may find there is no clear starting point, nor is there a clear path to achieve the goal. Consequently, rather than addressing the issue, the potential advocate is paralyzed by fear, ineffectiveness, simple uncertainty or emotional numbing.

Considering all the calls for the incorporation of advocacy into the professional identity of psychologists, a critical examination of the literature reveals where the field stands. The available literature only provides fragmented information on the essential characteristics of advocates. Expanding this research and gaining additional information

about how advocates develop can be helpful to training programs as they search for ways to develop social activists. Further, understanding how the advocates learned their skills can help training organizations be targeted in their instruction of students as they develop the next generation of advocates.

To date, the literature on advocacy traits, advocacy types, and methods of learning advocacy have primarily been quantitative or theoretical in nature. This study proposes to enhance the understanding of advocacy characteristics using targeted interviews of mental health professionals currently involved in advocacy efforts.

This exploratory research will focus on determining some of the fundamental factors involved in developing an advocacy stance among professional psychologists. In particular, this study will focus on the training of advocates, the temperamental disposition of the individuals who work on the behalf of others, and the mentorship enjoyed by individuals performing advocacy activities. Ultimately, this study will seek to broaden the current literature in the area of advocacy work specifically among psychologists who follow a calling to serve others.

### **Research Questions**

This study addressed the following questions:

- 1) What skills are necessary to be an effective advocate?
- 2) Where or how were these skills learned/developed?

The results of this study can provide training programs with useful information about advocacy skill sets and best practices for developing advocacy attitudes.

Ultimately, doctoral programs may find ways of incorporating appropriate training to

develop their graduate students into future advocates for the profession, for the client and for the advancement of just social policies.

## CHAPTER II

### LITERATURE REVIEW

Based on the available body of literature focused on advocacy across professions, advocacy is clearly not uniform in degree or manner, nor is the practice consistent in approach (Freddolino et al., 2004). Just as there are multiple models and/or definitions of advocacy, there are also numerous characteristics linked to those participating in advocacy work. This chapter will review some of the key literature available on advocacy across multiple disciplines. In particular, the review will include specific characteristics found in individuals described as advocates. This review will highlight essential skills, knowledge and dispositional characteristics found to affect advocacy outcomes. Next, this chapter will review methods currently used to foster advocate development and training. Finally, this chapter will provide a critique of the available literature with a special emphasis on areas where the literature has limitations or is incomplete.

According to the literature focused on the counseling psychology profession, the efforts that have gained the greatest amount of attention seem to focus on advocacy for the profession, especially concerns that affect the entire national membership. These advocates have proven to be vital to advancing the professional goals and interest of the APA. In recent years, psychologists have garnered much attention from the media and from legislative bodies on several major issues including the role of psychologists in military situations (Kennedy & Johnson, 2009). Many have questioned the ethics behind having psychologists present during the interrogation of terror suspects while using

questionable and controversial methods of torture. The APA addressed this issue and took a stand on behalf of its membership to protect psychologists from participating in these questionable situations (Abeles, 2010; Behnke, 2006; Carter & Abeles, 2009).

Another significant and recent issue is the ability of psychologists to gain prescription privileges. The APA and various divisions of the organization have championed recognition of the need. Although this issue is not entirely resolved, several states have considered this issue and determined that psychologists, with proper training, would be better able to serve their clients if they had the ability to prescribe psychotropic medications (Fagan, Liss, Ax, Resnick & Moody, 2007; Sullivan, Newman & Abrahamson, 2007). This issue continues to receive significant attention and review.

Finally, one of the most recent examples of advocacy on behalf of the profession was the ongoing campaign for mental health parity in health care insurance coverage. In 2008, Novotney, writing for the *APA Monitor on Psychology*, announced that on January 1, 2010, Congressional legislation had ensured that mental health services would receive insurance reimbursement on par with medical reimbursement. This change helped to insure integration of psychology into the overall health care model. The creation of parity was not just a mandated insurance benefit, but it is also an effort to correct significant systemic problems in the delivery of mental health services (Miller, 2002). Further, mental health parity creates a pathway for individuals to begin addressing psychological concerns that, left unattended, could lead to mental and physical debilitation.

These are just a few examples of advocacy on behalf of the profession carried out by the organization representing the profession, the American Psychological Association

(APA). The aforementioned cases of advocacy on behalf of the psychology profession benefitted from the work performed in the office of the Public Interest Directorate within the APA. This organization supports and promotes efforts to apply the science and profession of psychology “to human welfare and the promotion of equitable and just treatment of all segments of society through education, training, and public policy (APA, 2010).” While these cases highlight professional advocacy by the APA, other organizations around the country and indeed around the world also work towards improving the lives of others. The advocacy work takes on many forms: political, social, and community advocacy.

### **Political Advocacy**

Examination of the literature provides a multitude of references to advocacy in its many forms. Some writers consider all forms of advocacy to be political in nature (Robinson, 1984). Political advocacy takes up causes, which are under the purview of the legislative process. This includes local, state, and federal efforts. Those that engage in political advocacy find themselves meeting with government officials, legislative staff members, committee hearings, and in grass roots support efforts (Miller, 2002). Topics often addressed through this process include issues of mental health and social justice legislation. In these instances, psychologists are best poised to provide critical research data to influence public policy. During the 1970s, the profession of psychology formalized their advocacy efforts within the APA by instituting the section on Government Relations.

### **Social Advocacy**

Speight and Vera (2004) describe social advocacy as “action linked with theory to alter the status quo” (p.113). Specifically, social advocacy typically addresses issues that affect the daily lives of individuals on the margins of society. These issues include, but are not limited to, fair housing, voters rights, equal opportunity employment, and civil rights. In essence, social advocacy promotes the welfare of the community as a whole. Putting social advocacy in action can be as simple as providing referrals to local social service agencies and community resources as a means to address the systemic needs of client individuals or organizations. It can also be as complex as organizing protests and accompanying clients to meetings in which they may feel disempowered.

### **Community Advocacy**

For those involved in community advocacy, their constituencies are those in their neighborhood or city. This advocacy typically focuses on a specific issue or cause affecting the community as a whole. These issues may include, but are not limited to, education, health care, jobs, and housing. Community advocacy describes the geographic limits of the advocates’ work, but the effort may still involve political work (Lopez-Baez & Paylo, 2009).

### **Advocacy Skills**

Throughout the literature on advocacy behaviors, several elements emerge as critical skills for taking on advocacy roles. These characteristics generally emerge as skills, knowledge, or attitudes. Among the most widely cited elements are leadership (Donaldson & Shields, 2009; Eriksen, 1999; Kiselica & Robinson, 2001; Trusty &

Brown, 2005), counseling skills (Eriksen, 1999; Ratts & Hutchins, 2009; Roysicar, 2009; Toporek et al., 2006), collaboration (Barber, 2008; Eriksen, 1999; Kiselica & Robinson, 2001; Ratts, DeKruyf & Chen-Hayes, 2007; Romano & Hage, 2000; Trusty & Brown, 2005; Toporek et al., 2006), professional identity (Eriksen, 1999), empathy (Nilsson, 2005; Waterston, 2009), political interest (Nilsson, 2005), knowledge (Trusty & Brown 2005; Waterston, 2009), moral development (Rest, 1984), and disposition (Bemak & Chung, 2008; Vera & Speight, 2006; Waterston, 2009).

### Leadership

Across multiple disciplines, leadership is an essential skill to carrying out advocacy work. Leaders, those who intentionally influence others, must have the ability to be visionaries, strategists, experts, and cultural activists. Donaldson and Shields (2008) view organizational leadership as a critical factor in transforming “service agencies into agents of social change.” Leaders are agitators and instigators who hold power sources accountable for their actions including adherence to their stated missions. Arredondo & Perez (2003) suggest that social justice leaders derived their leadership “from inner strength, personal courage, and deep spiritual convictions.” Professional school counselors (Trusty & Brown, 2005), counselors (Eriksen, 1999), and psychiatrists (Barber, 2008) have all linked advocacy activity to individual leadership skills.

### Counseling Skills

Throughout training, doctoral students continuously refine their counseling skills. Those skills that were identified as necessary for effective advocacy include group leadership skills (Romano & Hage, 2000), attending to group process (Romano & Hage,

2000), listening (Eriksen, 1999; Roysicar, 2009), information gathering (Eriksen, 1999, Roysicar, 2009), and relationship building (Baldwin, 2003; Eriksen, 1999). Listening skills are essential to understanding the needs of individuals and organizations. Coupled with Socratic questioning, listening leads to appropriate information gathering. Combining effective establishment of rapport with the ability to attend to the process of an organization leads to a collaborative course of action in developing an advocacy plan.

### Collaboration

Because making changes to social structure and political issues requires building consensus, collaboration is essential to the advocacy process. Ensuring an atmosphere of inclusiveness and diplomacy creates an environment that produces productive engagement. Collaboration also requires one to finesse negotiation ability with statesman-like skills (Eriksen, 1999; Trusty & Brown, 2005, Barber, 2008). Dale Miller, State Representative for the 23<sup>rd</sup> District of Ohio, began his career as a clinical psychologist. In his special article to *Professional Psychology: Research and Practice* (2002), Miller describes numerous scenarios in which collaboration was instrumental to his work. He attributes his collaboration with community groups and grassroots efforts for advancing mental health initiatives within the state of Ohio.

Collaboration extends beyond work with other professionals to the communities served. These groups collectively are experts in their own issues and have valuable insight into addressing the problems at hand (Toporek et al. 2006). Ratts et al. (2007) refers to school counselors as 'achievement advocates' and suggests their advocacy requires collaboration when focusing on issues of justice related to students.

### Professional Identity

Professional identity typically changes over time often resulting from one's experiences. Professional identity encompasses one's belief system, personal values, professional motives, and individual experiences. These characteristics, along with personal attributes, combine to produce a professional identity unique to the individual. According to Eriksen (1999), having a clear sense of one's own professional identity is essential to successful advocacy efforts. With a clear sense of professional identity comes confidence that the cause championed is congruent with the beliefs of the advocate taking on the charge.

### Empathy

Trusty and Brown (2005) assert that empathy, compassion for and understanding of another's emotional state, is necessary for effective advocacy. Having the ability to understand the perspective of others may serve to strengthen the resolve of the advocate. For pediatricians working in community clinics, empathy was essential for good communication and effective advocacy (Waterston, 2009).

### Political Interest

In 2005, researchers Nilsson and Schmidt examined college students' interest in advocacy. With 134 graduate students participating in the study, political interest was the single tested variable that individually predicted desire to work for social justice advocacy. Combined, political interest and desire predicted involvement in social justice advocacy. While Nilsson and Schmidt presented promising findings, other studies have found that political interest is not enough to develop a social justice orientation. Caldwell

and Vera (2010) interviewed 36 identified social justice advocates in the field of psychology for the purpose of determining the influences of critical incidents that led to a social justice orientation. The reported findings indicated political ideology or political interest did not promote the development of a social justice orientation.

### Knowledge

The American School Counselors Association (ASCA), in developing their advocacy competencies, highlighted elements of knowledge critical to effective advocacy. Familiarity and understanding of resources is essential and can be useful in the advocacy process (Trusty & Brown, 2005; Vera, Buhin, Montgomery & Shin, 2005). Beyond knowledge of resources, advocates must have knowledge of parameters, advocacy models, and systems changes. Parameters include rules, policies and legal rights while understanding advocacy models and systems change provides the advocate with flexibility of approach and insight into creating partnerships (Trusty & Brown, 2005). Bemak and Chung (2008) further this understanding to incorporate knowledge of formal and informal power holders in organizations as essential to the change process.

Toporek et al. (2006) remind the profession that social justice advocacy was created for transforming knowledge into actions. In their examination of doctoral level graduate students and psychology professionals, Caldwell & Vera (2010) found 58% of the study's participants identified education and learning as critical to developing a social justice orientation. More precisely, participants identified coursework, readings and scholarship as essential to their social justice development.

While knowledge can be powerful and empowering, Roysicar (2009) cautions against waiting until knowledge is complete before advocating for a cause. Citing historical figures (e.g. Buddha, Mandela, and King) who facilitated monumental change without the benefit of training or maturity, Roysicar calls for counselor-advocates to just “get started.” Further, Roysicar suggests transformation can occur in the process of engaging in advocacy activities.

### Moral Development

Theories of moral development abound. However, using Kohlberg’s model, (Crain, 2005) advocacy work suggests an individual must reach a developmental level that allows him or her to move beyond adherence to social contract. For an individual to fight against the status quo, he or she must subscribe to universal principles of seeing all people as individuals and ensuring the individuals’ rights to basic dignity.

Rest’s 1984 research and review on moral development for counseling psychologists found that ego-strength garnered through moral development was linked with mobilization into action. Further, he asserts, “health professionals who score high on moral judgment are rated as doing a better overall job than those who score low, and this probably means that one’s moral judgment is a crucial ingredient in being able to help others.” Additionally, another study (Barrett & Yarrow, 1977 as cited in Rest, 1984) suggests that social assertiveness was an essential component of pro-social behavior in children.

In his writings about moral development, especially development of ego strength, Gibbs (2003) argues, “ego strength links perception to action and goal attainment

*irrespective* of the content of the goal” (p. 126). Gibbs observations are cautionary, as ego strength does not always lead to pro-social behaviors.

While Rest’s research presents interesting theoretical underpinnings in the relationship between moral development and advocacy, the empirical data from which he draws his conclusions comes from studies done with seminarians, dental students, and children. Also of note, the studies from which Rest draws his assertions are 30 to 60 years old. Considering cultural shifts during the past several decades, it is not clear if studies done today would have similar findings.

#### Disposition

In 1999, D’Andrea and Daniels (in Vera & Speight, 2003) found that apathy contributed to a lack of antiracist action among psychology trainees even while possessing a liberal disposition. Those individuals identified as having a “principled activist disposition” had a better understanding about systems of oppression. These same individuals were also more likely to work to empower those on the margins of society. Further, a positive outlook in the form of believing change is possible contributes to an overall advocacy disposition (Bemak & Chung, 2008; Waterston, 2009).

Bemak and Chung (2008) view apathy as a coping mechanism for professionals working in static environments. Apathy permits counselors to avoid incidents of conflict with colleagues and organizations that may not support social justice advocacy or initiatives for systemic change. Remaining complacent ultimately signals support for the status quo.

While disposition is found to be relevant to being an advocate, Trusty and Brown (2005) find it the “least mutable” of the competencies necessary. These authors point out that disposition are closely related to an individuals’ beliefs and values and inherently requires a level of autonomy. For individuals new to the profession, autonomy may fall in direct contrast with the requirements of the employer. Following rules, learning the ropes, and getting along in the system are more likely to inhibit autonomy than to promote it.

The limited number of studies in this area provides an opportunity for this study to expand the understanding of dispositional characteristics that can contribute to effective advocacy work. In particular, this study endeavors to contribute to the current body of literature by understanding the skills of individuals currently participating in effective advocacy efforts. Beyond exploring skills, this study also proposes to examine the means by which advocates develop their advocacy stance.

### **Training Methods**

Clearly, there are differences in professional training and socialization into the profession. Students choose programs that suit their professional goals. They select classes that suit their individual interests. Professors, supervisors, committee members, colleagues, and a vast array of others expose students to facets of the profession. One method for introducing students to a variety of experiences is through service learning. Service learning has become an integral part of the college experience. Many colleges and university have integrated service activities into existing curriculum. For counselors and psychologists, there are universal requirements for practica training and internships.

These experiential forms of learning vary depending on the agency within which the training takes place.

This next section will review service learning, externship/internship/practicum experiences and modeling/mentorships. While the scholarship in this area is highly concentrated on service learning, some research is available on the other forms of training to create social advocates.

### Service Learning

Over the past several decades, universities around the country and indeed around the world, added service-learning opportunities to course curriculums and, in some cases, to university graduation requirements. According to Butin (2007), service learning is “the linkage of academic work with community-based engagement within a framework of respect, reciprocity, relevance, and reflection.”

Cuban and Anderson (2007) describe service learning as activity that ranges from technical conceptualization to political conceptualization. Technical conceptualization resembles charitable acts or charity work. Political conceptualization of service learning addresses issues of power imbalances and perspective taking to guide social change. Butin (2007) uses the intersection of service learning and social justice education to arrive at “justice-learning”. At this intersection, individuals move beyond empathy and charity and into a frame of action orientation.

Service-learning programs tend to fall into two categories: exposure and engagement (Warren, 1998). Exposure provides students with opportunities to share encounters with marginalized populations. Engagement service learning includes a

broader understanding of the social, cultural, and political dynamics of the populations with which the individual is working. Studies have found that service learning can lay the foundation for developing critical thinking skills and strengthening moral development (Warren, 1998).

While service learning can help facilitate a social justice mindset, there are many detractors from this form of learning. Gorham (as cited in Robinson, 2000) observed that some service-learning efforts could actually be detrimental to the organization and the learner. One-time efforts or basic volunteerism, which fails to explore the limitations of the system providing “poor training for critical citizenship, political reasoning, or social transformation” (p. 607), are prime examples of ineffectual service-learning experiences. Robinson (2000) proposes service learning must move away from a model of helping and towards a more encompassing experience of transformation.

#### Externship/Internship/Practicum Experiences

APA approved internships must meet specific criteria for accreditation. Fundamentally, internships provide the doctoral students a capstone experience in which to develop their skills, knowledge, and attitudes. While the APA competencies call for the students to develop skills around helping clients to be self-advocates, there are no stated benchmarks for developing advocacy skills (Fouad, et al., 2009). However, one of the goals of internship is to build leadership skills, which have been linked to advocacy characteristics.

In research focusing on critical incidents in the development of social justice orientation, participants reported practicum experience played an important role in

learning about social injustices. Caldwell and Vera (2010) suggest “exposure to injustice may be an essential vehicle through which social justice orientation development is influenced” (p. 172). Baluch, Pieterse, and Bolden (2004) offer an alternative viewpoint. These authors suggest that psychologists-in-training have been oppressed and in practice “we have had the experience of having our realities denied and viewpoints denigrated” (p. 95). They continue with the observation that some consider “social justice analysis utopian; political, not psychological; and inappropriate advocacy work” (p. 95) These authors were students in doctoral training programs when they attending the 4<sup>th</sup> National Counseling Psychology Conference in Houston. Their comments reflect their experiences as graduate student members of a U.S. racial minority group. These are important observations in light of counseling psychology’s move towards social justice advocacy.

#### Modeling/Mentorship

In their study of school counselor advocates, Field and Baker (2004) found mentorship to be critical to the counselors’ advocacy development. In the interviews of the participants, the authors found both formal and informal mentorship were instrumental in developing an advocacy stance in their professional positions. In a study of pre-doctoral psychology students and psychology professionals, participants reported mentorship as a critical incident in their development of a social justice orientation (Caldwell & Vera, 2010).

At the 2004 National Council of Schools and Programs of Professional Psychology (NCSPP), members voted to adopt advocacy as a “professional value and attitude’ (Lating, Barnett, & Horowitz, 2009). The following year, NCSPP completed a

self-study, which for the first time included items directly and indirectly related to advocacy. Over 60% of the respondents reported their institutions did not offer advocacy training to students or faculty. However, the vast majority of respondents identified advocacy as highly important. Lating, et al. (2009), call advocacy an “inherent part of our profession” (p. 110). To ensure the professional development of advocates, these authors call for role modeling and mentorship as a means of integrating advocacy into training.

#### University Training Model

In addition to the aforementioned training methods, one institution has taken advocacy training a step further. The University of Tennessee in Knoxville (UTK) is the first APA-accredited educational institution to adopt a scientist-practitioner-advocate training model. Since its inception in 1980, UTK has infused advocacy into all aspects of the time-honored tradition of scientist-practitioner model.

Finally, the APA has developed a sample curriculum for advocacy training. While still in a draft form, it is not clear how the training guide will be distributed, implemented or integrated into psychology training (American Psychological Association [APA], 2010). However, the content included in the guide appears to be instructional for political advocacy efforts. In fact, it appears the guide serves as a “how to” for those advocates interested in moving into the political advocacy arena.

Many researchers have addressed characteristics of advocates and models of advocacy. However, a limitation in the scholarship is the dearth of empirical studies in the field of advocacy. Multiple searches for articles outlining the path to advocacy

yielded minimal information. Eriksen (1999) provided the most compelling data on the essential elements of an advocacy effort. In addition, her study, qualitative in nature, of 28 counseling profession leaders examined actual functions of advocates, advocacy strategies, targets of advocacy efforts and obstacles to advocacy.

The Eriksen study is helpful to understanding more about the advocacy process. However, the study does not expound on how individuals become advocates, nor does it inform the profession about how to generate interest in developing advocacy as a component of one's professional identity. It does not provide a comprehensive view of skills necessary to engage in successful advocacy efforts.

Most of the writings about advocacy fall into the category of "thought pieces." These articles are important to the exploration of advocacy skills and indeed provide a point from which launch. However, they are primarily the opinions of individuals familiar with the process. This study proposes to interview current advocates in the mental health field in order to determine the skills they have used to successfully advocate on the behalf of others.

## CHAPTER III

### METHODS

This chapter outlines the research design, including the reasons for using a qualitative method for data collection and analysis. While quantitative research has provided the psychology profession with a wealth of information and empirical data, qualitative research allows one to consider complex psychological incidents and to document subjective experiences with comprehensive descriptions of those experiences (Morrow, 2007). Accordingly, qualitative research permits the investigator to focus on context and process, which results in a rich understanding of the lived experience.

Over time, counseling psychology has increased the use of qualitative research methods and designs. Numerous counseling psychologists have argued qualitative research “methods more clearly capture the complexity and meaningfulness of human behavior and experience (Morrow & Smith, 2000 p. 199).” Further, qualitative research serves to expand the body of knowledge about the phenomenon and allows the consumers of the research to decide how the data may be transferred to another context (Holloway & Todres, 2003; Morrow & Smith, 2000).

This study used qualitative methods through the constructivist interpretive paradigm. This paradigm acknowledges that one cannot know the “truth” in the absolute sense. Rather, the constructivist viewpoint asserts that the investigator becomes more sophisticated in his or her understanding of a phenomenon and presents the information

in a coherent and comprehensive manner (Morrow & Smith, 2000). As this study is exploratory in nature, this paradigm is essential to building an articulate and reasoned understanding of skills needed to be effective as an advocate in the mental health field.

As Creswell (1998) indicated, in phenomenological research, the researcher describes his or her own experiences with the phenomena of interest. In this case, it is important to note that the researcher has a background in advocacy through the Juvenile Diabetes Research Foundation. In my capacity as the 6<sup>th</sup> congressional district government relations advocate, I had meetings with the representative and health aid from my congressional district to support increased funding for the National Institute of Health (NIH). Additionally, I have met with my U.S. Senator to discuss the health implications and financial impact of diabetes with a goal towards creating awareness and increasing funding for stem-cell research.

In addition to meeting with legislators, I made numerous phone and email appeals to national leaders in Congress and the Senate to ensure proper funding of the NIH as well as support of stem cell research. Another aspect of my work as advocate included recruitment of families to speak at the government relation meetings. I have also been active in fund raising efforts that directly support research towards treatment and cure of insulin dependent diabetes mellitus.

Other areas of advocacy include immigration and health care. I have been an advocate for immigration reform and have worked to create supportive documents for individuals working towards permanent resident status in the U.S. My current employment is with a community hospital where much of my work relates to advocacy

efforts for individuals with a variety of needs. These needs include psychiatric treatment, housing, food and other social needs.

When embarking on this project, it was imperative to be aware of my own notions of advocacy skills and methods through which they can be learned. I remained cognizant of this throughout the interview process and when a participant inquired about my interest, I was forthcoming with my own experiences; careful not to influence any responses the individual might supply during the semi-structured interview.

### **Research Design**

This exploratory qualitative study implemented psychological phenomenology guidelines originally presented in 1994 by Moustakas (as cited in Creswell, Hanson, Piano, and Morales, 2007). These guidelines suggest that researchers document the selected individual's awareness and insight about the phenomena of interest. This information comes in the form of the participant's own lived experiences. Next, these experiences were condensed to the quintessential elements of the event(s) in question. As the phenomena of interest for this study is advocacy, individuals with familiarity and essential understanding of the process of advocacy were targeted for participation. The responses were for commonalities of experience among the individuals in an effort to provide logical structure to the narratives (Creswell et al, 2007; Dukes, 1984). After data were condensed, critical elements of the data were subject to further review by the participants of the study. Each participant was provided with the preliminary findings of the study and invited to comment on the findings.

## Participants

This study implemented a peer nomination method to locate a pool of potential participants that fit the criteria for this study. Peer nominations originated through contact with organizations and individuals who have social visibility for their advocacy work. Individuals from this initial process were asked to identify someone who has participated in advocacy efforts outside of their paid employment. The individuals were able to nominate themselves for the study. Subsequently, the study used the snowball approach, also referred to as the chain method, for soliciting additional participants. This method asks participants to refer other potential study participants based on similar characteristics.

In order to ensure the largest possible pool of participants, the criteria for inclusion in this study was rather broad. Participants were required to have a master's or doctorate degree in a mental health field. Additionally, the individuals had to be engaged in some form of advocacy work. Registered lobbyists were not included in this study. Finally, the participants had to be located within a 150 radius of the researcher's sponsoring university in order to be included. Establishing a geographic restriction helped ensure that all participants would be easily accessible in order to conduct face-to-face interviews.

The recruitment process started when 71 invitations were sent, via email, to individuals for self-nomination or nomination of a colleague. Within four hours of the initial email effort, the first response arrived. Overall, 26 individuals agreed to participate. Due to scheduling difficulties, six of these individuals were unable to take

part. Twenty individuals participated in this study; eight of whom were self-nominated, while other professionals referred the remaining 11 participants. One referred participant nominated another individual for inclusion in the study.

The participants of this study came from a variety of socio-economic and ethnic backgrounds. They came from major cities, suburban settings, and rural farming communities. Each of them described their journey towards advocacy with passion. Many reflected on how little time they spend thinking about their advocacy actions and in several cases, participants indicated the interview for this research project was the first time they were asked to characterize their work in such detail.

Of the 20 participants, there were 7 males and 13 females. The range of ages for participants was 31 to 65 with the average at 45.5. The median age was 42.5 and the mode was 40 years of age. Thirteen individuals from the participant pool identified as European American/White. Two individuals identified as African-American and two identified as Latino/a. Other members of the participant pool included one individual who identified as Multiracial/Biracial, one indentified as Asian/American/Pacific Islander and one individual identified as European/White.

When asked to identify their current place of employment, 2 of the 20 participants identified more than one employer. Eleven of the study's participants indicated employment at a university or college. The remaining individuals reported working for social service agencies (5), hospitals (2), private practice (3), government agency (1), and other (1). At least two other participants are known to have multiple employers but only

identified one employer on his or her demographic questionnaire. Table 1 provides the demographic data for the participant pool.

Table 1. Participant Demographics

Variables	%	n
<b>Participant Age</b>		
30-39	30	6
40-49	35	7
50-59	25	5
60-69	10	2
<b>Gender</b>		
Female	65	13
Male	35	7
Total	100	20
<b>Educational Level</b>		
Master's Degree	70	14
Doctorate Degree	30	6
<b>Race/Ethnicity</b>		
African-American/Black	10	2
Asian-American/Pacific Islander	5	1
European American/White	65	13
Latino/a	10	2
Multiracial/Biracial	5	1
Native American	0	0
Other	5	1
Total	100	20
<b>Current Employer</b>		
University/College		11
Social Service Agency		5
Government Agency		2
Hospital		1
Private Practice		3
Other		1
Total		23*

*Note % = percentage of participants who responded in this category. n = the number of participants in each category*

*\*The total is larger than the number of participants as two participants identified multiple employers.*

### First Level Participants/Nominators

Qualitative research often uses purposeful sampling that seeks out participants who can provide rich information on the phenomenon studied (Coyne, 1997). Purposeful sampling takes many forms, including snowball or chain methods. This study employed the snowball method through a peer nomination system in order to gain access to the final participants of this study. The nomination process called upon individuals; themselves considered experts in the area of advocacy through their paid employment, published writings, and/or professional presentations, to nominate colleagues in the mental health profession known for their front line advocacy work. These same individuals were also informed they could nominate themselves for participation in this study.

The initial recruitment email was sent to 71 individuals; the nominators or first level participants. Of this initial group, eight individuals self-nominated for participation in this study. The remaining individuals, those who did not self-nominate, were asked to snowball the process to another set of professionals that met the study qualifications for participation. In essence, this study made use of two purposeful samples (the nominators or first level participants and the second level invited participants).

Each individual in the nominating pool received an email and/or letter outlining the purpose of the study and the criteria for the nomination of an individual to participate in the study. All individuals contacted in the service of this study received informed consent forms, which included the right of refusal without consequence. All identities and names of the nominees were disguised for confidentiality.

### Second Level Invited Participants

Second level invited participants were those individuals that were referred to this study by the first level participants or nominators. Eleven individuals from this group were available and agreed to participate in this study. These individuals, like those in the initial mailing, fell into a discrete category of achievement; one in which the mental health professionals had a reputation for, or history of, working as advocates. In some cases, their work is highly recognizable, while others worked outside the spotlight. However, as these individuals had a record of advocacy work, their experiences provided valuable insight into the phenomena of advocacy work and essential advocacy traits.

### Third Level Participant

Of the second level individuals that participated in this study, one continued the snow ball process and recruited another participant for the study. This was the only participant that was two levels removed from the initial recruitment email.

### Data Collection/Interviews

This study utilized the semi-structured interview for data collection. The semi-structured design was implemented to elucidate from the participants information about their lived experiences (Holloway & Todres, 2003; Madill & Gough, 2008). The length of each interview varied between 30 and 65 minutes, with an average interview length of 45 minutes. The interviews were digitally recorded for subsequent transcription. At the conclusion of each interview, the participant was invited to return to any of the interview questions or to further comment on the interview as a whole. When the interview was transcribed and checked for accuracy, each participant was sent a copy of his or her

interview for further comment. This process provided the participant with an opportunity to add information that may have been overlooked, to clarify any content areas and to reflect on the interview process (Suzuki, Ahluwalia, Arora and Mattis, 2007). The majority of participants indicated they felt comfortable with their responses and did not feel compelled to revisit any of the questions.

The method of interview was in-person using a semi-structured interview process. All participants received the questions prior to the interview allowing them to gather relevant information and thoughts on the advocacy process. Additionally, each participant received written informed consent prior to the interviews that included the nature and level of involvement by the individual, permission to withdraw from the study at any time without consequence, and information about methods employed to preserve their anonymity. All participants signed the informed consent form (Appendix E).

### Sample Size

Guidelines for qualitative research vary in determining an adequacy of data. In her article *Quality and Trustworthiness in Qualitative Research in Counseling Psychology*, author Susan Morrow (2005) states there is no absolute number. While she agrees that the research must have an adequate number of participants, the range is from three to five transcribed interviews to the hundreds. Hill, Thompson & Williams (as cited in Morrow and Smith, 2000) recommend a sample size between eight and 15 participants. In her own research, Morrow has used 20 to 30 interviews, but also finds 12 to be adequate when it is necessary to predict a sample size.

In their review of qualitative data collection, Suzuki et al. (2007) suggest three to ten participants are sufficient for phenomenological studies. Additionally, they propose interview lengths of two hours with each participant to ensure in-depth data collection.

In qualitative research, redundancy or saturation is the recommended stopping point of data collection. In essence, this is the point at which the information becomes repetitive and the importation of new data no longer contributes to the finding of new information. As each individual has unique experiences and skills, one can never be certain of complete redundancy among participants (Eriksen, 1999; Morrow, 2007). Data analysis took place as the interviews were completed. The process continued until practical saturation was reached. In the end, a total of 27 individuals expressed interest in participation however, 20 interviews were conducted for this study. At 20, it was evident a practical saturation point had been reached. Additionally, logistical complications and scheduling concerns prohibited the use of the remaining six voluntary participants.

### Analysis

Phenomenological research concentrates on using the specific narrative and statements of the study's participants. This is in contrast with other forms of qualitative research (e.g. grounded theory) in which the researcher gains impressions from the data to create a model from the interpretations. Additionally, in phenomenological research, it is the lived experience and the essence of those experiences that is the central focus of the analysis. Consequently, thematic analysis is an iterative process, which attempts to clarify specific meanings by "moving back and forth between whole meanings and part meanings (Holloway & Todres, 2003).

For this study, each interview was fully transcribed and checked for accuracy against the original recording of the interview. Each transcription went through two levels of review. Participants received copies of his or her transcript for correction, clarifications, and annotations. Of the 20 participants, 16 respond to the request to review the transcript of their interview. Of the 16 who responded, 50% of the participants made corrections and/or annotations to the transcript.

The primary researcher as well as two secondary coders reviewed each of the 20 interviews. The secondary coders each were master's level clinicians working in the mental health field. One of the study's coders, trained in the social work field, has over 20 years experience working in a variety of mental health settings including social service agencies and hospitals. The second coder trained as a counselor. The second coder's mental health experience includes working for a government agency and a busy community hospital. Both coders have participated in advocacy work at individual and community levels.

All of the researchers, primary and secondary, analyzed the transcripts for every interview. Research team members analyzed interviews as the transcriptions were completed with an eye toward advocacy skills and skill development that helped to explain the phenomenology of becoming an advocate. In each interview, participants addressed specific questions. However, the actual responses to the meaning of the questions were often found throughout the entire text of the transcription.

The research team involved in this study initially worked independently to create an edited list of salient themes for each individual interview. The researchers exercised

caution to retain the integrity of the narrative structure and ensure fidelity to the context of the participants' response. Then the primary researcher met collectively and individually with the secondary researchers to review the findings. These meetings also served to establish categories for the data extracted from the transcripts. As each of the researchers examined more of the transcriptions, many themes developed organically from the participants' response. When the researchers were unable to reach consensus regarding themes, items were temporarily placed into a miscellaneous category for subsequent review. The researchers returned to the miscellaneous category at the completion of all participant interviews. Through discussion of participant intent and review of established categories, the remaining items were sorted without dissent. In the end, consensus was reached on all items derived from the data. The research team came to an agreement on what was explicit in the interview and could be reported with confidence (Creswell et al., 2007; Holloway & Todres, 2003).

Using an iterative process of review provided the added benefit of ensuring researcher "bracketing." According to Morrow (2005), bracketing describes the process of researcher self-awareness in regard to "assumptions and pre-dispositions and setting them aside to avoid having them unduly influence the research." Any assumptions or pre-dispositions were challenged and discussed among the research team.

Another level of review occurred when the preliminary findings, formatted into a table, was sent to each of the participants for their review. Participants were invited to extend their participation in the study by making any suggestions or comments about the presentation of the data. Of the 20 emails sent, six individuals responded with positive

comments about the existing structure of the table. One of the six participants offered a few suggestions about the categorizations of data. Based on the positive reactions to the interview process, there was an expectation more individuals would be interested in commenting on the data.

### **Instruments**

#### Demographic Questionnaire

Each participant in the study was asked to complete a demographic questionnaire (Appendix B) in order to understand the type of advocacy training each participant received. Additionally, demographics were used to collect data about the respondent's age, race, professional training, certifications, and other relevant information about his or her career. This data was used to supplement and provide another dimension to the findings of the study.

#### Semi-Structured Interview

The open-ended questions in the semi-structured interview were intended to draw from the participant the essence of their lived experience. While the questions were presented to the individual participants prior to the interview (Appendix A), it was not anticipated that they would prepare complete responses prior to meeting with the researcher. In some cases, participants indicated they did not have the opportunity to review the questions in advance. Additionally, the semi-structured interview allowed for prompting and clarification during the interview. This way, the interviewer could verify his or her understanding of the participants' meaning while the participant had the opportunity to clarify any misinterpretations or misunderstandings.

The semi-structured interview asked the participants to reflect on their work as advocates to underscore the skills they deemed necessary to be effective in that role. Additionally, the semi-structured interview encouraged participants to reflect on where, or how, they developed the skills to be an advocate. During the interview, participants discussed influences in the development of their interest in working on behalf of others and reflected on ways in which training programs could incorporate advocacy instruction into curricula.

## CHAPTER IV

### RESULTS

#### **Advocacy Skills**

This chapter describes the significant findings and rich content of the semi-structured interviews conducted with participants of this study. Each of these participants enthusiastically engaged in this research and indicated ongoing interest in the findings of the study.

All the participants ardently described their advocacy activities and the skills they found most useful in carrying out their action. Across the entire range of advocacy work, from individual advocacy addressing an emergent need to working on national or international issues of human rights, several universal skills came to the fore. Of those skills, four major attributes emerged. Table 2 provides an overview of those findings.

Table 2. Advocacy Skills

Variables	%	n
<b>Counseling Skills</b>		
Communication		
Listening	30	6
Verbal	70	14
Boundary Setting & Self-Care	25	5
<b>Knowledge</b>		
Policies & Systems	65	13
Legislation & Legislator(s)	35	7
Resources	25	5
Self-Awareness	35	7
Research & Writing	35	7
Media	15	3
<b>Relationships / Collaboration</b>		
Individual	45	9
Community	75	15
<b>Dispositional Characteristics</b>		
Perseverance/Patience	40	8
Passion	35	7
Compassion/Empathy	35	7
Insight	25	5
Optimism	25	5
Risk-Taking	25	5
Adaptive	20	4
Humility	20	4
Motivation	15	3
Likability	15	3

*Note % = percentage of participants who responded in this category. n = the number of participants naming the skill during the interview*

Although some issues were mentioned with greater frequency than others, the amount of time participants spent discussing the various skills did not necessarily correlate to that frequency. Every attempt was made to categorize each item mentioned

by the participants. However, with over 15 hours of transcriptions emanating from this study, it is possible some items were lost in the review process.

### **Counseling Skills**

Several skills emerged as critical to effective advocacy work, among them counseling skills. While some of the participants referred to counseling skills at a general level, many of the participants named specific micro-skills essential to effective advocacy.

### **Communication Skills**

One could argue communication skills are at the core of essential advocacy competencies. This element was so crucial to the advocacy effort; it came up in 11 of the 20 interviews.

### **Listening Skills**

A common theme emerged throughout the interviews. More than a quarter of the participants identified good listening skills as a crucial element in their advocacy work. Some of the ways the participants characterized this skill included “active listening,” “reflective listening,” “careful listening,” and “empathic listening.” Many of these advocates emphasized their listening skills when relating stories about their advocacy work.

Several participants were very descriptive in their discussion of listening skills. There was much support for the notion that one must do more than hear the words of others. Listening, as proposed by several participants, required deep understanding of the individual and human condition. One participant working in a university setting stated:

...kind of having a listening ear and kind of listening beyond what's actually being put out at that moment, being able to read beyond words or body language, positioning yourself in different and uncomfortable positions...(Participant #8))

Another participant reported:

My expectation is that an effective advocate, in my own experience, is not that they be impartial, but that they need to be able to listen effectively. They need to be able to hear and understand not only their own point of view, but that of others. (Participant #18)

In a similar manner, a third participant stated:

I think the active listening skills and reflective listening skills, being able to not just listen to what people are communicating to you but actually hear behind the words what is being said.(Participant #2)

Another participant describes listening skills as more than an information-gathering skill.

I think a lot of it is spending time with whoever the individual is and really getting to know...a glimpse of their world on a day-to-day basis. Understanding what their triumphs and struggles are and I think, you know, that being said, being able to listen carefully, being able to listen empathically, being able to ask difficult questions. I think being able to hold a lot of tough feelings. (Participant #14)

When advocates listen to others, they have a responsibility to protect the trust of their constituency.

I'm not just listening to your life and being like a voyeur, but I'm really doing something with the knowledge that I have and they trust me. They trust me which is why they opened up because they know that I am going to do something meaningful, that I'm just not exploiting them for whatever my own personal reasons are, but that I want to assist them. (Participant #16)

### **Verbal Communication Skills**

In the context of counseling skills, participants referred to verbal communications skills as critical to the process. Verbal communication was described as a way of

ensuring that one “can get a message across” or to maximize a message in a restricted amount of time. Several participants named the ‘elevator speech’ as an essential skill when working with individuals with numerous demands on their time, in particular political figures. One participant described it as understanding “how that story can be told in a way that’s understandable – this short elevator speech, or the short sheet, a message that is understood by politicians or policy makers or other decision makers within the system.” This same participant also noted that there are times when more detail is essential. However, again he cautions against rambling in too much detail as ‘people’s eyes glaze over.’

Another participant stated, “You have to have a really solid elevator speech” as a way of always being prepared to take advantage of an advocacy moment. While a third participant stated:

I think it requires communication skills, verbal and writing skills and not academic writing kinds of skills. It’s more how to get to the point and be succinct. People don’t have – it’s the elevator speech, it’s the – if you are at a county fair, somebody stops at the booth – what are you going to do? (Participant #11)

Finding the balance between detail and expediency is critical. Another reason good verbal skills are necessary is to ensure you are meeting the needs of your audience. When expressing a message to different audiences in different venues, the needs of each group may require unique presentation.

I think you can learn how to communicate. I think communication styles, because there are different situations, may call for different language, if I can say it that way. I think systematically I will speak differently than I do case-by-case if this is a client, or a student, or an organization, and not necessarily like a department. I think you navigate differently just by how you talk. (Participant #8)

For specific types of advocacy, verbal communication skills are crucial. One participant describes a scenario that requires finesse in order to avoid failing in the advocacy effort.

...other than listening skills that to be able to, at times, talk with their parents and be an advocate for them. And there's always a fine balance of how to talk to parents because you want to be able to say enough to affect change and you don't want to say too much where it's going to be damaging for the person that you're trying to advocate for. So, I think advocacy there's a fine – there's a balance. And sometimes it feels uneasy like walking on a tight rope. (Participant #14)

As they outlined advocacy competencies for professional school counselors, Trusty and Brown (2005) established the need for communication skills as a requisite proficiency. Kahn (as cited in Roysicar, 2009) also supported the need for counseling skills for advocates especially listening skills.

#### Boundary Setting and Self-Care

Mental health professionals across the spectrum face challenges to their boundaries when they embark on advocacy efforts. In part, this may be attributed to the looser temporal boundaries associated with working in communities or simply outside the confines of a clinical setting (Slattery, 2005). For the participants of this study, the concern about boundaries came to the discussion in a variety of contexts.

While it was clear that advocates must maintain boundaries to protect the client or community, they are also necessary for the protection of the advocate. Some referred to these boundaries as necessary to prevent or slow burnout. One participant described a powerful learning experience in which establishing boundaries leads to better self-care.

For me, one of my big things I learned early in my social work type career was about healthy boundaries, even with really marginalized populations, where my heart goes out and where my first kind of big thing that I did this work in India. I

worked there for a year in the village with children, women and it was on children's issues but we had women as well. And so, realizing that a dollar to me was a minimal thing, but a dollar there made a huge difference between rescuing, the difference between effectively empowering, what the healthy boundaries are and also learning. I think I had some good mentors there who helped me understand that if you want to be doing this long term, you have to know what your limits are or what your boundaries are, because if you're unclear on that, you will burn out; you will not be doing this a year from now. You have to learn now how to say 'no', how to set those limits, how to take care of yourself in order to have a long-term sustainable career. I think that's one of the most powerful things I've ever learned. (Participant #9)

Another participant with experience working in on a crisis team expressed how boundaries could be protective.

So it could be boundary issues because you have to be careful with boundaries. And when do you – I guess that's another thing for an advocate, you need to know your boundaries. And so I certainly, I learned them more and more as time went on. Crisis Team was equipped to – you either learn them or you die. (Participant #10)

Professional development courses in mental health professions often address concerns about self-care. Among professionals, there is an understanding that the lack of self-care contributes to compassion fatigue. One participant who works in a social service agency highlighted the topic when indicating the need to know “how to do advocacy without injuring ourselves”. Another proposed questions advocates should be asking themselves.

...if you don't deal with what's going on inside of a person, which of course is kind of a spiritual question, I think it can only go so far. I mean, I think that's one of the biggest reasons for burn out is that if you don't deal with 'what does this say for me' and 'how am I being impacted by seeing some of these things' – in addition to the policy questions, economic questions – I think it's not a very whole approach...It's all about cognitive dissonance and doing nothing about the affect... (Participant #12)

Trusty and Brown (2005) recognized the need for self-care in the development of advocacy competencies for the professional school counselors. They acknowledge the work of advocacy requires a tremendous amount of energy and insist self-care is essential to avoiding burn-out.

### **Knowledge**

Nearly every study participant used the word knowledge when identifying advocacy skills. However, the type of knowledge was almost as varied as the participant pool. Of the 17 participants identifying knowledge as essential, five major areas emerged as most prominent.

#### **Policy and Systems**

A number of individuals had a record of advocacy in areas of policy at an institutional level as well as at a public level. Many individuals used systems and policy interchangeably. One individual working in a social service agency described a need for “real world understanding of the practical, political mechanisms involved in decision making and funding” in order to ensure advocacy efforts were targeted in the best possible way.

In another instance, one advocate described the knowledge of systems as integral to knowing “how to interact with different systems within an organization, within a setting.” Another individual used knowledge of systems to advocate for others within the system

While most people seemed to refer to agency systems or political systems, one participant supported the understanding of “family systems.”

## Legislation and Legislators

Numerous participants had worked in the legislative arena either directly or indirectly, with a variety of governing bodies; from local city councils to national forums. They expressed the need to understand how the legislative system works and how to work within the system to achieve the aspirational goals.

...there are a certain methodology of strategies that tend, or skill, that tend to make for greater success in advocacy. For example, I do need to get to know legislators on a first name basis and to the extent I, in terms of strategy or methodology, then I can make friends with their administrative assistants. That's really a key for me because when I know them on a first hand basis, I know that they are going to pass the message along. I – and I know if I – if someone I need to talk to is in the office I might actually get to talk with them on the phone rather than simply be put in voicemails. So that – and I tend to – while volume is important, volume of calls, because they count calls and they count emails, phone calls are irreplaceable. I also realize that when they're, hopefully when they're in Springfield they're working, that's not always the case. So, I keep track of the schedule when their in session and when I know they're in the home office I will make sure I'll make a connection then. (Participant #19)

Another participant also referred to the importance of understanding the legislative process and maintaining perspective about working with political leaders, even after 20 years of advocacy work.

Meeting the politicians, I think, has been an intimidating process and it still is for me. They put their pants on one leg at a time but somehow their stature or status makes them different and you feel a little intimidated but with most things the more you do it, the better and more comfortable you are with it. (Participant #3)

This same participant has also faced the frustration of legislative work.

...there's been times where I've submitted a testimony to the city council for example, or subgroups of the city council where I felt like, I was listed and there were 30 people standing in line to give testimony and it just seemed like they felt the obligation to listen but they had already made their minds up for example about things, or they wanted to appear or give the appearance of being open and hearing what the testimony was about, but in fact it didn't really matter much. (Participant #3)

When this participant was asked about why one would continue to participate in a system that seemingly was established with a design to frustrate, the participant elaborated:

Well, I think part of it is that if there weren't people standing in front of them that would let them off the hook too easily and be even easier for them. So, I guess to that extent there is some positive impact because it still implies a level of accountability that they're still required to listen to people whether it has any impact on them or not. So, unfortunately, there's sort of – some authority and power associated with the people giving their presentation for example. (Participant #3)

Participant #3 highlighted the need to understand the legislative process for reasons beyond pushing for action. Through the testimony, the participant's engagement in the process was also a method of monitoring the power sources. Essentially, the participant described using knowledge of the legislative process as a method of ensuring a measure of accountability.

### Resources

Understanding the availability of resources and the communities within which they serve was an important factor related to advocacy. For some individuals, this required networking, research, or word of mouth. Whatever the preferred method for learning about resources, many participants felt this was an essential tool to use in advocacy.

And I think you have to know your resources. You have to kind of be able to problem solve and be okay with whatever resources. 'What are their limitations?' 'What can they offer?' And being able to kind of organize it in some way that you can utilize it effectively. (Participant #17)

You know, definitely a learned skill is understanding what's in your community or what's out there to help advocate. You know, I could say till I'm blue in the face 'every school needs a computer for every kid,' but the resources aren't there so that's not going to be an effective way to advocate. But to know what's

available, to know what's in your area as well as understanding different resources... (Participant #15)

One of the participants described the need to know resources especially as it pertained to a marginalized population.

Well, I also think kind of being able to be in touch with resources in your community – that can help – in this case, young adolescents, in knowing that they're not alone. And helping them either find a support group, or find other people that have gone through similar process, or being able to find out what are the community resources. How can you get this person to feel connected and to feel supported, to not feel alone? So, I think it's also getting a sense of knowing how to connect people to certain agencies. (Participant #14)

### Self-Awareness

Of all the skills or essential qualifications necessary for advocacy, self-awareness seemed to have triggered a powerful response in some of the participants. Participants identified multiple facets of self-awareness essential to be effective, among them: understanding personal motivation, understanding personal limits, having an ability to keep one's ego in check, a willingness to fail while also having the ability to ask for forgiveness.

I have come to learn that I've got to figure out what the renewable source is. What is like water? Something that flows and changes and is manipulated in different ways, can be ice, can be steam, can be that – can rejuvenate, refresh and ...and fortify me for all the pitfalls of being an advocate for myself and others. (Participant #18)

The concept of the 'wounded healer' came up during two interviews. The participants expressed concern about advocates who may not have fully learned about themselves and their motivations.

There are way too many wounded healers that are in the field, or attempt to be in the field. They may believe that they are there to try to help others because what they've been through. But there's a lot of them are not well yet and they come to try to fix themselves. And I think they're going to have trouble advocating for other people... (Participant #10)

I see a lot of advocates and allies out there doing work and sometimes maybe even good work that haven't effectively dealt with their own stuff yet and when they are challenged, they don't know what to do with it. They get really angry....I think those knowledge of limitations help you get over the rough patches and help you get over the difficult times that you will endure. (Participant #2)

Self-awareness is also essential in ensuring the advocacy effort is not about the advocate but about the people they serve.

Last week we had a big conference on faith and civic engagement and, one wonderful keynote speaker, she asked me... 'what do you do to ground yourself in this kind of work?' And I said, 'well, you surround yourself with people who hold you accountable.' Because I think the thing about being an advocate or an activist – it can become about you, It can become very egotistical and you can become extremely self-righteous... (Participant #12)

#### Research and Writing

Several of the participants saw good reasons to have the ability to research. The ability to research ensured advocates had the capability to keep abreast of latest trends, remain up to date on policy changes, stay aware of opposing views and be able to present thoughtful, logical arguments for their cause.

I think you have to be able to do research, to dig deep, dig beneath the surface and to be able to think globally in terms of the interests and the stakeholders who are involved in the conversation that you are having. (Participant #16)

One participant discussed the way research helps to understand the views of policy makers.

Just in terms of overall strategy, I – to the extent I can, I do my best to understand their own particular platforms and look for areas where we might have some common ground, some intersection. That takes research. So, you got to be a good researcher. (Participant #19)

## Media

Three participants indicated that skilled use of media might have a profound effect on advocacy efforts. One participant indicated the value of understanding how media presents opinion and how policy makers use that information.

And I think it's also very useful to understand something about the way news media works – in the day when people read newspapers. I knew that people read the letters to the editor – that's the most read section of a newspaper and the opinion pieces from the editorial board – least read, but legislators read those opinion pieces. So, it's not only did I have to know how people understood opinion, I had to figure out which group looked at what. (Participant #11)

Another advocate described having a reputation as an individual who works on specific issues which in turn results in invitations for radio appearances. Those appearances often result in ongoing exchanges with listeners who move the discussion into email exchanges. A third advocate described the use of newspaper media to spotlight an issue with immediate and far-reaching implications.

I knew on a practical level what that would mean and it was around the time of budget cuts and we happened to have a contact with somebody from the *[name removed]*. She happened to talk to me and I got off on a conversation with her about this and she got very interested in it and we had a couple meetings and she ended up writing a front page story in the *[name removed]*. It was under the fold, it was a big story. ...within three days, I think, of that story coming out the policy was reversed and it was because of that story. (Participant #3)

Kiselica and Robinson (2001) proposed the use of media for the advancement of advocacy efforts. They highlight the Internet as a means of creating awareness through wide exposure. They also suggest it's a means of capturing the attention of on-line reporters. One of the study participants also highlighted this use of technology, especially the use of list serves.

So, you know, the majority of people don't like to sort of take that step out and write a comment on the list serve and I think there are some skills to doing that and not making it too long, not making it too rambling, not being too, too radical. You know, trying to be a little careful. I think there are a lot of skills in that and then that sort of gets the ball rolling and it can get bigger and bigger actions going. (Participant #1)

### **Relationships / Collaboration**

Building individual relationships as well as community relationships is essential to creating an effective advocacy network. Additionally, several members of the participant pool reported the need for relationship to ensure accountability and support. One individual indicated it's "helpful to know principles of community organizing." This same participant went on to say, "I think another skill I learned in advocacy work is to figure out how to get people involved in an issue to take action on an issue." Throughout the interview process, several examples emerged to highlight the essentialness of relationships, collaboration and coalition building.

The American Counseling Association (ACA) acknowledged the need for community in the development of their advocacy competencies. While examining those recently adopted competencies, Ratts et al. ((2007) highlighted the need for community and the ability to build relationships. These authors stated, "broadening the ownership of the issue at hand in order to achieve hoped-for and lasting results is dependent on teaming with others.

In discussing the need for individual and community relationships, one participant commented:

So, I mean, you could be the one to establish that initial – but I feel like you always need support in order to make the bigger change. It's definitely not one

person making the global change. ... So I feel like definitely you need a big power backing behind you to really make a movement successful. (Participant #5)

A number of participants employed a community in their action efforts. Some recognize the need for accountability, others point to the various strengths found within a larger group. As one participant put it:

So it's part of that coalition building that everybody has slightly different skill. And when you find those people who also have that common interest and sort of obsession and addiction to that issue and really care, really love to dig into that issue and work on it, that's, you know, that's, it's just the best thing in the world. (Participant #1)

Another participant who works with student groups highlighted the need for having a community of support when doing the difficult work of advocacy.

We try to avoid one person goes out and does something themselves; we always do it in groups. And that was something with St. Vincent as well. And because you need that community to keep you going and to wrestle with some of this stuff, because it's tough. (Participant #12)

Participants identified many reasons for needing community for effective advocacy efforts. One participant discussed the tension between following a passion and serving a community.

We're not really good working together as a group. I think that many people, with our rhetoric, so often will say things like 'you should follow your passion, you should follow what you want to work on,' and one thing I challenge my students on is, there is an element of that that's selfish. Then you're just doing what you want to do but what about what the community needs and maybe sacrificing what you want in the name of what needs to be done. (Participant #2)

Building community is not just about professionals imposing their views on others, especially the constituent community. The advocacy must include members from the community where the action is being taken.

I suppose that you, looking at myself and looking at those people that I work with who have been strong advocates, I have several friends who sit on boards of various agencies and people I know through work, they all have a caring attitude. They have a concern about their fellow human beings that they might actually be able to help them in some way or the other. (Participant #13)

Finally, other participants looked at the ‘big picture’ when explaining the need for community in performing advocacy.

Everybody agrees that we need a strong national defense, we need to have clean water and we need to have food and those types of things. How can we apply that more universally to problems, I guess. that’s the hard part. I mean, you can’t do that individually. You have to do that with a group. And so advocacy, well, I can advocate for my individual patient...to get them hooked up with food stamps or whatever, to get them over to a food pantry. How much does that really help the broader base problem of hunger and all the other people who are going hungry? We have to acknowledge more as society and more as a group that we need to do more. How do we do that? You can only address those huge problems by coming together eventually, I think. (Participant #13)

It is also building – you have to be able to build connections so that if you’re an advocate that’s in your community, people need to know who you are, and you need to know who people are, so you can make that phone call. So you can say, ‘hey, can you help me out with this’ or ‘what do you know about that?’ (Participant #10)

### **Dispositional Characteristics**

Trusty and Brown (2005) have stated that dispositional characteristics are the “least mutable” of all advocacy competencies (p. 261). These authors link disposition to values and beliefs and suggest ones values and beliefs are the least subject to change.

While participants in this study also expressed the need for many dispositional characteristics, they also were quite clear that dispositional traits could be learned and developed.

One participant discussed a previous career in the business field and credited corporate customer service training for teaching basic advocacy skills and developing a passion for serving her customers (Participant #20). Being challenged about personal beliefs caused another individual to develop a passion for helping (Participant #15). Further, referring to passion, one participant stated, “You can foster it through encouragement, challenge, and support.” (Participant #7)

Another participant in the study observed that experiences could help to mold disposition. This participant cited spring break trips offered to college students as vehicles for building a sense of passion about advocacy.

...because you hear there’s a trip going to New York and new Orleans or something and you want to do something with your spring break, that you want to make difference, and that’s all you know. Often times they told me they had no idea what they are signing up for. They have no idea what it’s going to do to them. And then they come back and they are on fire and that’s their ‘a-ha’ moment...(Participant #12)

Patience was also cited as something that could be nurtured and developed. “Well, I guess, well, can you learn to be patient? Yeah, I think you probably can make an effort to – to change. I firmly believe that. But I think it helps having the natural ability. “ (Participant #7)

One participant did not necessarily think a specific dispositional characteristic was essential to effective advocacy. When asked to expand on a response about skills, specifically the need for dispositional characteristics, one participant simply stated, “No, I definitely think that there are things that can be learned.” (Participant #11)

### Perseverance/Persistence

Many individuals identified perseverance as a critical skill in advocacy work. Others referred to it as patience, tenacity and endurance. In several interviews, participants specified the crucial ability for one to ‘stay the course’ if they are ever to make a change to the oppressing system.

Yeah, I mean I think that’s where the perseverance comes in. Last year, I met with maybe ten different legislators, folks in policy making decisions and I – there was only one instance where after being given the opportunity to speak, I wasn’t met with the counter argument ‘thank you for coming’, where somebody said, ‘tell me more’ or ‘you really made me think’ or ‘I am going to talk to somebody in Springfield.’ By and large, it’s a lot of beating your head against the side of a building. (Participant #19)

Probably patience. I think patience would be a really good one because it can be really frustrating. I don’t know how many times I felt frustrated because I couldn’t find the resource, or I couldn’t get people to where they needed to be... (Participant #17)

I’ve done things where it just felt like, I’ve presented testimony to places where I felt like I was going through the motions and I’d submitted the written version and the oral version and I was like on a treadmill with a lot of other people and it didn’t matter. But then times where you do feel like it makes a difference is very rewarding and reinforcing in and of itself. And where there is real tangible evidence of what you’re doing making a difference in the organization and the people we serve and that’s a very rewarding thing, and it’s sort of intermittently rewarding but that’s a pretty powerful reward mechanism anyway, when it does work. (Participant #3)

For me, I don’t think there’s ever an end date in anything that I’ve been interested in. I think there’s always an ongoing component. I think that it’s important to find just small changes and victories that keep you going – momentum or to see some level of change. But I think it’s always an ongoing process. (Participant #9)

One of the consequences of not having perseverance is claiming a premature success. A participant identified it this way:

...the barrier is just that it's so easy to give up and say, 'that's it'. Or to change one thing like a policy but not insure that policy is actually implemented which is just as important as having the policy in place. (Participant #1)

### Passion

The advocates interviewed for this study not only identified passion as an essential skill, they also exuded passion while they discussed their work.

Interviewee: Well, we can't, you know, just can't be an effective advocate until – unless – and this just sounds so cliché but it's so true – if you don't feel passion for your cause – it's just not going to happen. And, I've been lucky to have been drawn to a field that allows me to fulfill my mission in life. ... (Participant #19)

Interviewer: ...What's your mission?

Interviewee: Simply to make a difference in the lives of people who may feel excluded from the community. And central to that is my real commitment to working with families – to creating healthier families. That's why I do what I do. (Participant #19)

“I think you have to have some passion, some fire, but not come off as if you're angry,” is how one participant cautiously uses the characteristic of passion in the advancement of advocacy.

### Empathy

Empathy seems to be at the core of mental health professionals' collective identity, yet it is not easy to explain. One participant stated, “I think empathy, empathy is a skill set that's difficult to really quantify. Teaching empathy is exceedingly difficult; but I think that is so important.” Another participant pointed out that empathy is not always easy to show.

It's interesting because the first thing that comes up for me is empathy but I also feel on some level, for me, that's been challenging. Because, I feel like some of those – sometimes the work gets harder to stomach depending on what you're doing... And so, I think the fact the empathy, almost over empathizing or over

feeling can be really tough. So, I think you have to be able to really be able to really have a protective mechanism that allows you to – that we learn as professionals in our field, that we learn more how to do this... (Participant #19)

### Optimism

“You’d have to believe that things could be better” is how one participant viewed the need for optimism in advocacy work. Another advocate simply stated that there was the “everyday reality of believing another world is possible.” Yet another observed, “Looking at the good in all things can help you get through those times even if it’s a God awful disaster. If you can find one flower that’s survived a tornado and working from there, that’s huge.

So it has to go on. Somebody has to make a decision to continue to do this work regardless of what you see, because I know that right now what I am seeing is not going to be the outcome, that I know these systems will be dismantled. Things that oppress other people, it’s going to come down. I may not see it in my day but I know that it is going to occur. And so, I have to trust in that and have faith in that and continue to do the work in spite of things that I see around here at this time. To know that somebody is listening, somebody hears me, somebody understands what we’re trying to do, and it may not happen today, and it may not happen next year, but eventually this thing will happen and these systems will be dismantled and I have to trust that. (Participant #16)

Participants consistently identified the expectation, or belief, that things can change as vital to carrying on the work of advocacy. Individuals identified many reasons why optimism could wane but also cautioned against giving in to the negative energy created by pessimism. One participant working in a university environment observed:

The key to doing it is optimism – that things can get better for people and that in time, they can change, hope. What also keeps me doing this is an insatiable belief in the realities of the human condition. What that means is that we are orientated towards change and that we can make change happen. I think that is a reality of the human condition. (Participant #7)

## Risk-Taking

When describing incidents of risk-taking, the participants used risk-taking in many different scenarios. Among the ways described were risk to personal safety and professional credibility. One participant's experience exemplified risk. The participant was scheduled to present to a group on a social justice issue. Prior to the presentation, the participant received a threat.

It never dawned on me not to do the talk. What was sent, while disgusting and threatening, was also vague. I think if it was extremely detailed, maybe for that instance, I might have made a different decision. ...I never really considered doing something different and my wife is awesome. She never would have asked me to do anything and her and I both reflected that – this is really an important demarcation for young allies and advocates – that isn't it part of the problem that I can choose not to do this if I wanted to and then I would be fine. And other people don't have that choice and that's a huge part of the problem. (Participant #2)

In an email response to a communication discussing this incident, the participant went on to say:

If we only operate from a place of safety at all times then we are not truly invested in this effort. Justice is risky and there are a great many people living that risk every day. And, by the mere fact that this risk is a choice for me is reflective of my privilege. (Participant #2 – email communication)

One of the things I did in college was I did a social work internship in Kansas City, which was, that was my cross-cultural experience. It was so different. It was so another world for me...and so I got a little apartment in Kansas city which really totally was freaking out my family was like "OK, I hope she is going to be OK," and I was in this program. Part of the program was living in the projects and learning how – and I was poor – for my first step out of middle class. And so yeah, so we had to not just read about it but do it. Live it. Feel it. (Participant #4)

During another interview, a participant explained that advocacy work can be uncomfortable and unpopular.

Interviewee: On a personal level, I think it takes an ability to tolerate – I'm not sure that not being 'liked' is the right word – but there aren't a lot of warm and

fuzzies in advocacy work. You're rocking the boat. Sometimes you're unpopular. You're the squeaky wheel. And, I think it takes a personality dynamic to be able to tolerate that, but that's okay. I can be unpopular. Everybody doesn't need to like me. Everybody doesn't have to agree with me but these are some things that I think need to be said, need to be heard, and it's okay if I'm unpopular and if I'm not liked, because I'm the one voicing that. (Participant #6)

Interviewer: So, it's a kind of personal risk as well as a professional risk? Would you say that?

Interviewee: Yeah. Yeah. (Participant #6)

#### Adaptive/Flexible

Advocacy work is not always linear, nor is it straightforward. Being able to adjust, think on your feet and recognizing an opening allows some advocacy efforts to move forward. One advocate described an effort to get army regulations changes so that prisoners in the stockade were paid a small sum so they could buy cigarettes and candy.

Well, I mean in the army I learned how to pay people and I learned that army regulations, AR's as they're called, can sometimes be flexible, you know what I mean, if you know how to be creative. It's what the situation demands, I mean there is not one specific learning tool. It's adapting. And, it's like how can I maybe get this changed. (Participant #13)

Participant #13 pointed out that even when rules and policies exist, there are ways to be adapt to the situation. In fact, the ability to be flexible seems to be essential to participating in work as complex as advocacy. Being open to new ideas, was identified by Khan (as cited in Roysicar, 2009) as one of many key characteristics of social justice advocates. Each situation requires the advocate to adapt to the circumstances presented. No two situations are likely to be identical and as such advocates must be able to seize on opportunities when they occur.

## Humility

Being modest and respectful was a recurrent theme among participants. Ensuring one is mindful of those they serve, helps to maintain humility. Humility was also cited as being critical to understanding even those in need have strengths.

...that's when these conversations started to happen with the parents explaining to me how they went to one store and another store and how they use coupons or whatever they needed to do to stretch this \$200 a month, or what have you, to put clothes on the kids back and all these things and I'm like, "wow." I had no clue. But in order to be able to do that there has to be a sense of humility and to know that these people have strengths that you don't know about. Leave the stereotypes out, because I had my own perceptions of who they were. (Participant #16)

I think humility in that you have to know that you have to continually be working on yourself. None of us are ever done; there's no finish line. There is no doneness, ever. You have to understand that it's a constant work in progress. (Participant #2)

Another way in which advocates discussed humility is in understanding they may not be present to witness the fruits of their labor.

If you are involved in advocacy, if you're involved in activism, if you're involved in working for justice, the reality is you are going to fail a lot more than you succeed. And it's, I think, naïve to think otherwise. So talking about what that feels like and being humble enough so share that when it happens, to walk with the students through the anger, you know which needs to be there during the bitterness. But telling them that it doesn't have to end there, it's not just up to them and if they have a faith, if it, you know if I go to Christianity there, it's not – there's a prayer, it's not written by Archbishop Romero, people think it is, but he used it. But it's about you know we are not the master builder. It is for us to work as much as we can. St. Ignatius said the same thing, plant the seed, but we may never see the fruition of that. And having the humility to say that and to own that and there's liberation in that, because it's not all about you. So, it doesn't let you off the hook, but it gives you, I think, a different frame work of meaning. (Participant #12)

Humility also means apologizing when necessary.

Screwing up when I intend to do well and by action, or my thoughts, or my words I do poorly, or I end up oppressing somebody else or, God forbid, hurting the

group I'm advocating for – that's painful. It's embarrassing. It is – anti everything that I try to stand for and having the ability to own up to my mistake – to apologize, and then to re-forge burnt relationships, that can be discouraging or disheartening. It's hard to do. It's hard work. (Participant #18)

Another component of humility is to let others take credit for the work (Roysicar, 2009). While this facet of humility was not directly mentioned by participants, it was eluded to by at least one individual.

You have to be able to see others around you rise up and sometimes move ahead of you. Surpass you. You have to be okay with that. You have to be able to have your ego be able to be smaller than it usually is in order to be an effective as an advocate. (Participant #18)

#### Motivation

The discussion around motivation included concepts of initiative and 'self-starter.' For one participant describing basic skills for advocacy, motivation was essential.

I think a lot of times, I think you have to be pretty much a self-starter. Because, I think sometimes, if there aren't the resources there to start it up, you have to be able to take the initiative and start it up. (Participant #17)

When asked to elaborate on the way the participant was using self-starter, the participant elaborated.

Being able to identify okay, where there's sort of a gap and not really having someone prompting you to find the holes but being kind of take a step back, look at the system, and kind of know where you could intervene. I guess that's how I would define self-starter. (Participant #17)

### Likability

Most individuals would agree, it is easier to work with someone you like than the alternative. While some participants hesitated to mention likability because of its simplicity, they also stated it is something that works to open doors.

I mean, honestly, I think you have to start from that place where you're outgoing and friendly. It sounds ridiculous to say, but hopefully you have good facial expressions, that you're welcoming and kind. And in your outward appearance, you're open and available. (Participant #20)

Yeah – or just being likable. I mean, isn't that a lot of what it is? I mean, it's just like the same thing with sales. I mean you mentioned earlier the relationship thing, people enjoy talking and doing business with people with whom they're comfortable and they like. I'm sure that's part of that goes on and because natural inclination to listen to people and want to spend time with people that you like. So it seems like the obvious thing. (Participant #3)

Participants of this study referred to many dispositional characteristics while addressing essential qualities of an advocate, Trusty & Brown (2005) in their work on advocacy competencies for school counselors identified autonomy, altruism, and risk taking as essential elements of advocate competencies. This study found evidence of risk-taking among interviewed advocates and within risk-taking is a level of autonomy. . However, one disposition that was not mentioned by participants of this study, except in a cautionary sense, is “altruism”. One participant cautioned against altruistic motivation and stated, “I don't think you can float just on altruism for very long.” She went on to say if “you go on altruism, every time you fail, that's going to crush you.” (Participant #4)

### **Training Methods and Influences**

How and where advocates learned skills is equally as important as the skills themselves. This information provides us with new insight into ways to build training

programs infused with advocacy skill development. Table 3 displays the methods and influences on advocate learning.

Table 3. Training Methods and Influences

Variables	%	n
<b>Scholarship and Academic Instruction</b>		
Graduate Education	50	10
Scholarship	30	6
<b>Experiential Learning</b>		
Internship/Practicum	25	5
Service Learning/Immersion/Volunteerism	15	3
Career/On-the-Job Training	50	10
Professional Organizations	15	3
<b>Mentorship/Supervision</b>	50	10
<b>Personal Influences</b>		
Family & Community	45	9
Religious Community or Faith Teachings	35	7

*Note % = percentage of participants who responded in this category. n = the number of participants naming the training method as important to learning to be an advocate*

### Scholarship and Academic Instruction

#### Graduate Education

Participants interviewed for this study had to have a degree in the mental health field to be included. Their degrees came from the field of social work, community counseling, community mental health, clinical pastoral education, pastoral counseling, counseling psychology, clinical psychology, and human services and counseling. In this category, there were significant disparities in the level of advocacy education individuals received based on their program.

While some individuals hailed their programs as wonderful incubators for advocacy development, others clearly stated advocacy was not a part of their formal education. One participant who had received her education in a Clinical Pastoral

Education (CPE) program described CPE as “very much rooted in, you know, in issues of ethical... being ethically rigorous and justice for the people you serve and how you fit in the power hierarchy in relationship to the people you are going to care for.” Graduates of social work programs voiced similar sentiments. A participant employed by a government agency stated

...once I went into my social work studies it was very eye opening. The professors were wonderful. They really helped me challenge the way I thought about stuff and that’s kind of when the passion started to really get out there and, you know, find my own little...little niches for helping. (Participant #15)

In Caldwell and Vera’s (2010) study, they found twenty-two percent of their participants endorsing influence from a training program as essential to their social justice stance. This is interesting to note in light of the findings from a 2005 self-study of National Council of Schools and Programs of Professional Psychology (NCSPP) member programs. The results of the self-study indicated over 60% of the training programs conceded that they were not providing students with “advocacy training and activities for faculty and students.” (Lating, et al., 2009) Speight and Vera (2004) challenged counseling psychologists to examine the current structures of training programs and to include “coursework on public policy, consultation models, and oppression theory” (p. 116).

### **Scholarship**

Caldwell and Vera’s (2010) study with psychology graduate students and professionals also found that their participants were influenced by readings and

scholarship. Twenty-eight percent of their participants reported books, articles, empirical studies and a variety of other readings influenced their social justice orientation.

In this study, the influence of readings appeared with a good measure of consistency throughout the interviews. Iconic figures such as Gandhi, Martin Luther King and Saul Alinsky stood out for their social justice stance. This was noted by the first participant when he stated he "...also studied Gandhi, studied Martin Luther King, and really – and Saul Alinsky – and a number of different figures and really have always been working on what are the active ingredients of community action and being effective." This same individual noted he read books written by "non-psychologists who talked a lot about social action and the methods." Some of the other writers mentioned by name included Saul Alinsky, John Rawls, Julian Rappaport and George Lipsitz.

Other participants looked to recent texts to help understand the world around them in ways not taught in their history books.

I remember a book called "The Other Side of the River". I think it was called... it was a story about a town, probably, maybe 50 years ago, where it was a divided city. One side of the river was very poor, the other side was wealthy and, you know, it just talked a lot about the differences in society, and the differences in racist and economic divisions and, just how the police were not advocating for the poor back then and how they just were trying to sweep them under the rug....I think my upbringing, Catholic elementary school, Catholic high school.  
(Participant #15)

Use of popular readings were also influential to another participant when she read about childhood labor. Having grown up in a rural farming community, seeing children working the fields was an everyday occurrence. As part of a liberal arts curriculum, the

participant read Upton Sinclair's *The Jungle* about the Chicago stockyards in the early 1900s. The participant stated:

...you remember the book "The Jungle?" About those stockyards in Chicago? So, that's what the curriculum was and you know, and I'm like 'what?' Never heard that. Didn't know. No concept of that. Child labor didn't seem to be a justice issue to me because I saw some of my brothers bring home paychecks bigger than mine. And so, so it was really eye opening... (Participant #4)

Other participants also found readings from a variety of sources helpful to their leaning about advocacy and performing advocacy functions. One participant who discussed coming into the community mental health field in the post-Kennedy Community Mental Health Act and reported being inspired by the works of Saul Alinsky now turns to on-line sources such as "Protestants for the Common Good." The participant finds good informational pieces from this source that continues to contribute to his advocacy skills.

## Experiential Learning

### **Internship/Practicum**

Most major areas of mental health at the master's and doctoral level require some form of clinical experience; either through practicum or internship training placements. For many participants, these placements further enhanced their commitment to advocacy. While for others, these experiences constituted his or her first exposure to advocacy efforts.

Actually, when I was a student, I was involved in working in [*two city names removed*] referendum for the establishment of a 708 board, the mental health board of townships. And so we worked on that campaign to get that passed. Only [*first city name removed*] passed it for some reason, [*second city name removed*] didn't, but they did establish one in [*first city name*]. That was some advocacy

because we had to go around and speak to some ladies group at the First Presbyterian Church, or whatever, about how important this is. (Participant #13)

I think a major experience for me was when I was in my graduate program for social work and my first internship was at *[agency name removed]* which was on 41<sup>st</sup> Street, and it was a very low income neighborhood and I had lived a rather sheltered lifestyle.... And at that point I began to understand that I needed more exposure. (Participant #16)

### **Service Learning/Immersion/Volunteerism**

While some view volunteerism as charity and not advocacy, others argue the two are not mutually exclusive. In some cases, participants viewed these experiential training methods as synonymous while one participant clearly expressed they are not. The participant decisively stated, “Volunteering without reflection is just work.” One individual had volunteered throughout high school and later went on to rejoin a similar adult group. Michael wants something more added here – more explanation.

So that really, I was in absolutely over my head because I was the president and there were a lot of people, very well-meaning people, but not particularly educated. And we would go and visit people in the community. The priest would say, “this is going on, would somebody checkup on this person”? And they would be people struggling with addiction, domestic violence, I mean all kinds of things. We were kind of muddling our way through. And I think I have realized – I felt very alive in that environment... (Participant #12)

In terms of what I was doing before that was I volunteered – probably since my early 20s, I’ve always been doing some kind of volunteer work. And so, I think when you’re doing that you’re exposed to people who are interested and who I’m continually learning from. (Participant #9)

While some view volunteerism as charity and not advocacy, others argue the two are not mutually exclusive: Michael wants this expanded.

And in the academy there is a dichotomy growing very quickly between charity and justice and the idea is we start in direct service and that’s charity, but you move towards justice I mean somewhat like a ladder, which is systemic change

and that always involves advocacy. And I think it's a false dichotomy. I don't think you can do one without the other. (Participant #12)

### **Career/On-the-Job Training**

The most prevalent environment for learning advocacy, as endorsed by the participants, was experiential in that it occurred in their work environments. Many described situations in which they "learned by doing."

So, I was fortunate to get a really good education although it was all experiential. Never had a course in advocacy. Certainly was inspired by the work of Saul Alinsky back in those days. But we learned by experience and by the seat of our pants sometimes. So, our efforts weren't always terribly well organized or focused. But there was positive energy behind it. (Participant #19)

...it's really just been the experiences I've had and sort of, I think I've gotten better at it as I've understood the broader context of some of those kinds of settings and actually had the experience of participating in discussions with the people of varying levels. I mean, you get feedback visually or verbally or otherwise about how helpful things are and how things connect with people or not. People connect with things or not based on what your experience is after you do it for a while. So, I think that's what it has been for me, so just sort of a gradual learning experience. (Participant #3)

I had already got my bachelors sociology degree from [*University name removed*] and was working as a case manager for welfare to work program and I was starting the whole understanding of the needs of different people in society and so that kind of started fostering an 'oh, so you mean they don't have insurance to go to this place and they do have this need?' And so just the basic understanding...(Participant #15)

One participant credited the experience of working in the corporate world for learning advocacy. Prior to making a career move into the mental health field this individual had a busy and active career working in the telecom business.

You know one other thing I forgot to mention – and I believe this was huge in terms of learning to advocate for others – is my customer service training. I was training at [*name removed*]. That's where I – when I started, I did telecom... You got three weeks of intensive customer service training before you ever started.

And then, one week where you worked on the phone with somebody else on the phone, together, answering the calls. So, I mean, I never realized how intensive that was. Like, if you didn't do what was right by my customer, God help you. You know what I mean? And that, I was able to advocate for the customer and *[name removed]* was very supportive of that – so when you were advocating for your customer – most of the time, unless you're asking for something ridiculous – we did what we needed to for the customer and that helped a lot. (Participant #20)

### Mentorship/Supervision

The use of mentors to inaugurate individuals into a new system is a concept used in many arenas. It is common practice to ease an individual into a new environment using a mentoring relationship. While some mentor/mentee relationships are deliberate others are serendipitous pairings that have auspicious results. Serendipity accounted for one participant's mentorship relationship. She described the individual's impact in this way:

...he was a community organizer and seeing it from that vantage point, you know, how he could work the system and make it work for the community just opened my...gave me a lot of hope, gave me a lot of energy, gave me a lot of skills. (Participant #4)

One participant attributed several influences for developing into an advocate. As the interview was closing, the participant wanted to emphasize how a U.S. Congressman contributed to that learning process.

Actually, you know, in terms of like learning my skills, I did not credit the Congressman and the people like *[name removed]* and others that I worked with who were – I mean I learned a lot of my action working with them and I learned a lot of my policy, a lot of my strategies... (Participant #1)

Two other participants credited a public official with teaching the advocate ways to get their messages heard. The simple act of asking worked for one participant who reported "...through the years, I have asked decision makers to tell me how I can make a difference for them. So, I have had legislators tell me how to be a better advocate, just by

asking.” Another participant had a similar encounter with a state politician who she had met at the State’s Legislative Day.

I saw him at an event him at an event in Oak Park and I was like ‘hey, I met you at the State Lobby Day a couple of years back. Oh, by the way, we belong to the same church (I mean I used to belong to this church). And, also, will you come to my legislative breakfast that I want to hold?’ I’m hoping to host at the end of the summer. So, look at the door that it opened. And then he goes ‘Yes, and by the way, talk to me about our connection to [*Church name removed*] when we talk again.’ ...and he’s not going to remember me next time. I did think it was very cool that he said that and it gives you the opportunity to use that technique.  
(Participant #20)

### Personal Influences

The advocates in this study brought to light a very clear theme, the impact of informal personal influences on their acceptance of advocacy roles. Several participants spoke readily about these influences. Some advocates felt their early influences determined the trajectory of their advocacy careers.

### **Family and Community**

A number of individuals spoke of family influences on their path to advocacy. Additionally, others reported influence from their home communities, early school experiences, coaches, and teachers. Several participants identified deliberate efforts on the part of parents to engender a service orientation.

One of the participants identified the high-level of exposure to advocacy work done by the participant’s mother as contributing to overall advocacy interest and stance.

You’ll hear me mention my mother probably a lot during the interview because really she’s probably the most important person who shaped a lot of my beliefs and a lot of my desire to give back. So, that was all definitely my mom... before she had kids, she was on a jury, and the jury ended up sentencing this child - you know... this 17 year old gang-banger to life in prison and my mother was like, “I

can't bring myself to send this child to prison" but it was blatantly obvious what to do – she had to vote yes. It was obvious he had taken someone else's life. So to make up for that... she went to the Catholic Church in Cabrini Green where this kid was from. She went to the Catholic Church in Cabrini Green and walked in and said "I'd like to do some volunteer work here. What can I do?" Here's this white women in this very African-American neighborhood, and everybody in the kitchen there, they were all black, and they were all like "Oh, well here's a dishtowel. Help us dry these dishes. That's how you can start." And from there, we belonged to that church for years and years and years... but really, that was the beginnings. And you know, I couldn't have grown up really any other way, with any other mom. (Participant #20)

Another participant attributed parental influences for the development of an advocacy approach. Although the participant's mother and father engaged in different types of activities, they both worked on behalf of others. First speaking about the actions of the participant's father:

In his later years he and a good friend of his decided that the community needed a golf course. So they went and built a golf course. They didn't go and hire somebody with – they didn't spend tons of money, but they figured out what to do. ... But it was still that lesson of that was for the community. You just did that because kids needed something to do. That way the school kids could go and have a golf game and this and that, and that was the thinking. So very much influenced. (Participant #10)

This same participant goes on to say:

...you know my mom was always somebody if they needed something, she was there to help. So I just grew up with it. We never had a Sunday meal without us having – we kids had to help mom and we got big trays and we would always fill plates and fill these trays and deliver them to older people in town there who were shut-ins, so they would have meals. (Participant #10)

### **Religious Community and Faith Teachings**

While none of the interview questions related to the individuals' religious or faith orientations, many participants spontaneously spoke of their faith influences on their role as advocates. One indicated, "I went to religious schools as you know, and certainly we

are taught that all God's children are equal." Although one participant identified as atheist, he still referred to Christian teachings of "the meek overcoming the strong" as influential to his approach to life and his work.

Other participants were explicit in expressing the religious and faith based influences on their advocacy work. In explaining the source from which her advocacy stance comes, one participant indicated "the life of Jesus" going on to explain:

You know, 'cause Jesus is a radical. I think Judeo-Christian values in western society are highly corrupt and very questionable. And so, you know, I'm not resorting to a standard piety when I say, "look at the text. What does the New Testament say? What does the Old Testament say? I am talking about a man who says 'the first shall be last and the last shall be first.'" That has been the message for two-thousand plus years, and so that is what I am talking about. I'm not talking about how it's been contorted, twisted and denied in order to fit into our model of society here. (Participant #4)

When asked about where or how the participant learned to be an advocate, the response was quick and revealing.

The first thing that comes to mind is my Christian faith. To be quite honest, I think it shapes me in terms of my character and my awareness of other people. And I think with being a Christian it helps me understand how to relate to other people that are similar and very different. And so, I think that helps cultivate that idea of being an advocate because it's not just about me and it's about connecting with other people. (Participant #8)

When discussing the draw to doing advocacy work, one participant responded,

Well how else are you going to change the world? I don't have small ambition. I have big ambition. I think we can make the world a better place and I can't do it on my own, so I need to get other people involved. (Participant #11)

### **Summary**

Throughout the interview process, as themes were detected and categories created, it became clear that some individuals were more interested in discussing their

learning process while others felt more compelled to discuss their skill set. However, an interesting element of these findings was the regularity with which skills were identified across the participant pool. This was also true for the training method by which advocates learned their skills.

After creating a table of common themes, each individual participant received an email asking for any form of feedback they were interested in providing, including comments, suggestions, or challenges. Only 6 of 20 participants responded to the invitation. Of those respondents, only one made comments and recommendations.

It looks fantastic. My only thoughts is that in the first set of codes, so much of the information that falls under you “misc” category is really interesting stuff. Some of the “misc.” if not almost all of it, seems like it could be folded into existing categories, particularly if the titles were broadened a bit. There are also may be enough commonalities among the misc. items that new categories or a new category could be created. But they are just so interesting and relevant, it would be a shame to leave them in this section. Also with more interviews, some of the idea may find more pairs.  
(Participant #1)

This feedback prompted additional review of categories and broadening of themes. The secondary readers participating in the analysis of the study findings worked with the primary researcher to establish the final categories presented in this chapter.

## CHAPTER V

### DISCUSSION

This chapter will review the findings of this exploratory research, address limitations of this study, propose methods of incorporating findings into existing training programs for the mental health field and make suggestions for further investigation.

#### Findings

This study attempted to highlight the skills necessary to be an effective advocate in the mental health field. In addition, the study sought to reveal the ways in which advocates developed the necessary skill sets to carry out effective advocacy. The semi-structured interviews revealed four major categories of necessary skills for advocacy: counseling skills, knowledge, relationships/collaboration, and dispositional characteristics. Additionally, there were four major methods for developing advocacy skills: scholarship and academic instruction, experiential learning, mentorship/supervision, and personal influences.

The major skill set that emerged from this study supports the current literature on advocacy skills. The literature review revealed counseling skills, collaboration, knowledge, and disposition were all germane to the role of advocate, all of which were supported by the findings in this study.

This study's closer examination of counseling skills revealed two salient elements: communication skills and boundary setting. Communication skills included both listening and verbal skills. Participants expressed many forms of listening (e.g., empathic, reflective, careful). The participants also provided nuanced descriptions of verbal communication. The interviewed advocates indicated verbal skills must be balanced between efficiency and detail. In addition, this study's findings suggest advocates must adjust their language based on audience needs. While advocates are engaged in the work, they must also establish and protect their boundaries. Of the participants interviewed, 25% indicated boundary setting and self-care were essential to preventing burn out. The findings of both Eriksen (1999) and Roysicar's (2009) reflect the findings of this study.

Knowledge as an advocacy skill figured prominently in the responses of the activists. Nearly every participant in the study referred to the need for knowledge in some category. Advocates named policy and systems, legislation and legislators, resources, self-knowledge or awareness and research and writing as most necessary to successful advocacy work. The work of Trusty and Brown (2005), Vera et al. (2005), and Bemak and Chung (2008) support these findings. Trusty and Brown (2005), in their work with professional school counselors, underscored the importance of knowing resources and systems.

The need for relationships or collaboration with individuals and/or the community was another significant finding of this study. Throughout the interviews, these successful advocates invoked the need for community to achieve change. The ability to achieve

collaboration also requires the ability to establish solid relationships. Eriksen (1999), Trusty and Brown (2005), Barber (2008) and Miller (2002), found collaboration was at the center of productive engagement.

Dispositional characteristics have been found to be the “least mutable” of all necessary skills for advocacy (Trusty & Brown, 2005). However, nearly every participant proposed at least one dispositional characteristic to carry on this work. Among the most frequently identified characteristics were passion, perseverance, compassion, insight, optimism, and risk-taking. Very little has been uncovered in the reviewed literature about dispositional characteristic. However, Trusty and Brown (2005) suggest one must have an “altruistic motivation.” This suggestion runs counter to the views of one of this study’s participants that stated, “I don’t think you can float just on altruism for very long.” She went on to say if “you go on altruism, every time you fail, that’s going to crush you.” (Participant #4)

Finally, the use and knowledge of media as a tool in advocacy efforts appears to be a new finding. Knowledge of media did not appear in any of the reviewed literature. However, the participants that used media felt the value of that understanding was powerful. One participant was able to clearly articulate how a relationship with the media directly affected the outcome of an ongoing advocacy campaign. Understanding of media outlets and the way in which they could be used to bolster campaigns could benefit from further investigation.

After asking about skills, each of the participants elaborated on where or how they acquired their skills. This study identified four methods for skill development:

scholarship and academic instruction, action-oriented experiences, mentorship/supervision, and personal influences.

Half of all participants identified their graduate education, referring to course work, as instrumental to their development as advocates. Those who identified their graduate training as essential to this work did so enthusiastically. Others commented that nothing in their graduate training prepared them for their current work. This study supports the view that academic settings can prod individuals to move into advocacy. However, it is not clear if some other intervening dynamic may have been a factor in the participants move towards advocacy. Caldwell and Vera's (2010) study found 22% of participants credited their graduate training with for directing them into a social justice orientation.

Scholarship, or significant readings, appears to be a new finding for developing advocates. Of the twenty participants, six named authors and specific readings that guide or influence their work as advocates. The names of the writers and the text material were varied but the participants agreed that the readings resonated with them.

Action oriented experiences fell into four categories: internship/practicum, service-learning/immersion/volunteerism, career/on-the-job training, and professional organizations. Among the types of action-oriented experiences individuals may have, it appears service-learning, immersion, and volunteerism, seem to require the most explanation. Many of the interviewees viewed these opportunities as synonymous, while others were very clear in their distinction. One participant flatly stated, "Volunteering without reflection is just work."

Several participants found themselves on an advocacy trajectory following their clinical training experience in practicum or internship. This finding is reflective of the findings in Caldwell and Vera (2010) in which practicum experience played an important role in learning about social injustices. One participant qualified this by stating, “it really depends on the setting and the population” at the site in which the training is taking place.

Nearly half (9) of the participants learned their advocacy skills on the job. While some received no formal training as described by one participant “we learned by experience and by the seat of our pants sometimes.” Others felt they could observe others around them or receive some instruction and feedback from superiors or peers. None of the examined literature addressed on the job training.

Personal influences, those influences coming from family, community, or faith/spiritual teachings was one of the most discussed spheres of influence. While none of the participants were asked directly about family or spiritual influences, several participants recalled powerful lessons from these networks. Caldwell & Vera (2010) found influence from significant individuals played a role in the development of a social justice orientation. Thirty-nine percent of their participants indicated their parents or family taught them social justice values or modeled justice actions.

The role of faith and spiritual influences on advocacy roles complements the findings of Caldwell and Vera (2010). Of their participants, 14% reported religion/spirituality as critical to their acceptance of a social justice orientation. In his research and review on moral development, Rest (1984) found a linkage between moral development and mobilization into action. It is not entirely clear if moral development

can be linked to religious/spiritual influences or to family or community influences. This is an area that requires greater exploration but certainly seems to play a significant role in advocacy development.

### Study Limitations

This qualitative study was designed to produce rich, descriptive results that could supplement the current body of literature on advocacy development. As a result, the findings from this study cannot be generalized to a broader population. However, this study can be used to inform training programs in development of greater student advocacy development. Also, this study can serve as a foundation for deeper exploration the defined skills and training methods.

Another limitation of this study was the method of requirement. This study employed a purposeful sample obtained through the snowball method of recruitment. This method relies on identifying “first round” individuals to self-nominate (or recruit) additional participants. As the researcher started with a somewhat familiar pool of names, it could be argued there are similarities in between the researcher and those individuals known to the researcher, resulting in somewhat homogenous findings.

The original design of this study was to assemble a focus group after the final tabulation of findings. The focus group would have served to as a forum in which to triangulate the data. As this was not possible due to several logistical complications as well as scheduling difficulties, the researcher employed an alternative method of triangulation. The preliminary findings of the study were tabulated and put into a chart for review by the entire participant pool. The researcher invited all participants to

comment, provide suggestions, or question the results. The response rate did not meet expectations as only six individuals responded to the email and only one participant made substantive comments.

### Suggestions for Further Investigation

This study relied on the self-report of the advocates. While the advocates uniformly presented as candid, some of the participants seemed reticent to accept the title of advocate. Further investigation could broaden the literature by using third party reporting from colleagues or supervisors about the skills they see in the advocate. Another possible source of information would be the subjects of the advocacy efforts with which the advocates are engaged. The inherent limitation with that group is that not all advocacy efforts have accessible constituencies.

Another suggestion for further research would be to compare the development of advocacy skills within training programs across mental health professions. Anecdotally, there appeared to be a divide in the infusion of advocacy in training programs based on the area of specialization.

As stated earlier, the triangulation of data did not meet expectations. As such, subsequent research could benefit from the incorporation of a focus group. While this is a logistical challenge, with proper notice and use of technology to allow for video-conferencing, a focus group could provide substantive feedback on the findings. Alternatively, focus groups conducted at professional association meetings or similar events solves many logistical problems for the researcher. These settings provide easy

access to the target audience and eliminate the need for other planning challenges including establishing mutually agreeable times, dates, location and duration.

### Implications for Training Programs

While this study was exploratory in nature, the results raise many possibilities for reconsidering the current structures of training programs. Further, these findings may ignite a review of the core requirements for doctoral psychology programs, especially as the profession continues to call on its membership to adopt a professional identity that includes advocate.

This study is especially relevant to training programs housed in mission driven institutions, in particular, those institutions with social justice mission statements. Training programs housed in these institutions can be leaders of a new training paradigm, that of scientist-practitioner-advocate. By adding advocacy to the training model, programs not only express their commitment to training future advocates but also are likely to draw interest from individuals with existing advocacy interests. This combination can create a powerful synergy of advocacy actions.

The findings of this study have important ramifications for training programs interested in infusing advocacy experiences into existing curricular structure. The findings support the need for a multi-disciplinary approach to producing future advocates. Cross-disciplinary training could take many forms including a formal course, symposia or seminars. This study supports collaboration with professionals from the field of law and communications to instruct students in essential components of effective advocacy.

Another possible approach to building advocacy competency in students is to develop a lecture and lab course that includes the above-mentioned cross-discipline training with a hands-on advocacy project. The project should be relevant to the students and manageable given the time limitations of academic calendars.

Beyond the classroom, other possibilities exist for training students in advocacy skills. University programs should seek out and promote relationships with organizations that engage in advocacy work. Students who express interest in advocacy work should be encouraged to gain experience and knowledge through practicum placement in organizations involved in advocacy endeavors. In addition, graduate training programs are well positioned to promote advocacy training available through a variety of professional organizations (e.g. APA Government Relations).

As ‘community’ was found to be essential for effective advocacy, training programs should work with students to develop a sense of community among their peers. This can be accomplished through presentation of small-scale advocacy colloquia and symposium with counterparts (students and faculty) from other local training institutions. In this way, students meet their peers and can build relationships with other like-minded individuals.

This study included professionals from a variety of mental health fields. Graduate training and training experiences vary from program to program and from profession to profession. This is highlighted by the ACA’s and ASCA’s adoption of advocacy competencies. Training programs in the field of psychology may consider looking to those competencies as suggested guidelines for developing their own advocates. Further,

it may be time for psychology to follow the lead of the ACA and develop a set of advocacy competencies. With formal competencies established, training programs and internship training sites would have guidelines for developing future advocates.

Psychology needs to move beyond calls for social justice and recognize the need for action oriented training. When only 13 % of social justice courses address advocacy skills, it is difficult to see how the profession intends to move future professionals from knowledge to action (Pieterse, et al., 2009).

### Conclusion

This study was an attempt to identify necessary skills for effective advocacy. It also set out to identify the training methods by which those skills are learned. The participant pool for this study supplied a view into how the necessary skills have been employed in their advocacy efforts. Each of the participants were actively engaged in advocacy work and were able to provide firsthand knowledge of necessary competencies. Additionally, this pool of participants represented professionals across multiple mental health specialties working on an array of advocacy projects.

APPENDIX A:  
SEMI-STRUCTURED INTERVIEW QUESTIONS

## SEMI-STRUCTURED INTERVIEW QUESTIONS

1. How did you become interested in advocacy?
2. What skills are necessary to be an effective advocate?
3. Where or how did you learn these skills?
4. What is the draw to continuing your advocacy work? What are the rewards to this type of work?
5. What are barriers to engaging in advocacy?
6. Does the mental health profession have a special mandate to turn out advocates?
7. Are there any changes that can be made to the existing structure of training programs to move individuals from knowledge to action?

APPENDIX B:  
DEMOGRAPHIC QUESTIONNAIRE

## DEMOGRAPHIC QUESTIONNAIRE

### Characteristics of an Advocate

#### Demographic Questionnaire

Age: \_\_\_\_\_

Gender: \_\_\_\_\_

Highest Level of Education:

M.A. or M.S.: \_\_\_\_\_ in: \_\_\_\_\_ Year of Completion: \_\_\_\_\_

PhD: \_\_\_\_\_ in: \_\_\_\_\_ Year of Completion: \_\_\_\_\_

Additional Training, Degrees, Certifications:

\_\_\_\_\_  
\_\_\_\_\_

Race/Ethnicity:

African-American/Black \_\_\_\_\_

Asian American/Pacific Islander \_\_\_\_\_

European American/White \_\_\_\_\_

Latino/a \_\_\_\_\_

Multiracial/Biracial \_\_\_\_\_

Native American \_\_\_\_\_

Other: \_\_\_\_\_

Current Employer:

University/College: \_\_\_\_\_

Social Service Agency: \_\_\_\_\_

Government Agency: \_\_\_\_\_

Hospital: \_\_\_\_\_

Private Practice: \_\_\_\_\_

Other (please specify): \_\_\_\_\_

Type of Advocacy work (please provide a brief description of the kinds of advocacy efforts in which you participate):

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Please describe your training (if any) that prepared you for your advocacy work (e.g. course work, advocacy practicum, mentorship, service learning etc.)

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Thank you for your participation in this study.

APPENDIX C:  
INTRODUCTORY LETTER

Dear Colleague,

My name is Lydia R. Wiede. I am a doctoral candidate in the Counseling Psychology program of Loyola University Chicago. I am currently conducting research for my doctoral dissertation. My research involves examination of mental health professionals who are involved in advocacy work in an effort to determine the necessary skills individuals require to develop as advocates.

I am writing you to offer you the opportunity to contribute to the mental health field by nominating a single individual or multiple individuals for participation in this study. You may also nominate yourself for this study. For those who choose to participate, I will ask that they complete a one and half hour interview to take place in person. The location of the interview is flexible and will be mutually agreed upon by the participant and me. The interview will consist of questions about the process of becoming a recognized advocate for social issues and/or for the mental health profession. I will make an audio recording of the interview for further study. After evaluation of the initial interview, some items may need clarification. I may ask to the participant to address some follow-up questions. Follow-up would take place by phone, video conferencing, in person or by email.

Should you know of an individual(s) interested in participating in this study, please feel free to pass on this information. If you would like to nominate yourself for this study, I have attached a copy of the consent form for your signature. I am requesting the favor of your response by Friday, June 3, 2011. I greatly appreciate your consideration of this request.

Thank you,

Lydia R. Wiede, MA  
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Ph. 630-279-7961  
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Dr. Elizabeth M. Vera (Dissertation Chair)  
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APPENDIX D:  
INTRODUCTORY LETTER TO NOMINATED CANDIDATES

Dear Colleague,

My name is Lydia R. Wiede. I am a doctoral candidate in the Counseling Psychology program of Loyola University Chicago. I am currently conducting research for my doctoral dissertation. My research involves examination of mental health professionals who are involved in advocacy work in an effort to determine the necessary skills individuals require to develop as advocates. One of your colleagues in the field has nominated you for this study.

I would like to offer you the opportunity to contribute to the field by participating in my research study. Should you elect to participate, I will ask you to complete a one and half hour interview to take place in person. As I would like to make this process easy for you, I am willing to conduct the interview at your office or a mutually agreed upon location. The interview will consist of questions about your process of becoming a recognized advocate for social issues and/or for the profession. I will make an audio recording of the interview for further study. After evaluation of the initial interview, some items may need clarification. I may ask you to address some follow-up questions. Follow-up would take place by phone, video conferencing, in person or by email.

Should you be interested in participating in this study, I have attached a copy of the consent form for your signature. I am requesting the favor of your response by Friday, June 3, 2011. I greatly appreciate your consideration of this request.

Thank you,

Lydia R. Wiede, MA  
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APPENDIX E:  
CONSENT TO PARTICIPATE IN RESEARCH

## APPENDIX E

## CONSENT TO PARTICIPATE IN RESEARCH

**Research Title:** Characteristics of Advocates: An Exploration of Skills and Skill Development used in the Performance of Advocacy Work in the Mental Health Profession

**Principal Investigator (Researcher):** Lydia R. Wiede, MA

**Location:** Loyola University Chicago

**CONSENT FOR PARTICIPATION IN A RESEARCH STUDY**

You are invited to participate in a research project being conducted by Lydia R. Wiede, a doctoral student in the Counseling Psychology doctoral program, at Loyola University Chicago. The purpose of this research is to examine the skills used by mental health professionals in their advocacy efforts.

If you take part in this study, you will be asked to complete a one and a half hour interview with the researcher. Additional follow-up interviews may be conducted for additional exploration and clarification of information shared in the initial interview. The answers you provide will be kept confidential.

There are no known risks associated with participation in this study. If you participate in this study, there is no direct benefit to you. The goal of this study is to reach greater understanding about the process of becoming an advocate for the profession. Your participation in this study is voluntary and refusal to participate or withdraw from the study at any time will involve no penalty.

Interviews will be digitally recorded, transcribed, coded, and analyzed.

Identifying information collected during the study will be kept in a secure location and only the researcher and her dissertation committee will have access to the data.

Participants will not be individually identified in any publication or presentation of the research results. Pseudonyms will be used for all participants. In addition, signed consent forms will be kept separate for all data, and individual responses will not be linked to individual participants. All identifiable information, including recordings, will be destroyed at the conclusion of the study.

For questions or concerns about the study, please call the researcher, Lydia R. Wiede, at 630-279-7961 or email her at [lwiede@luc.edu](mailto:lwiede@luc.edu). You may also contact Ms. Wiede's dissertation Chair, Dr. Elizabeth M. Vera at 312-915-6958 or [evera@luc.edu](mailto:evera@luc.edu). This project has also been reviewed and approved by Loyola University Chicago Institutional Review Board. If you have any questions about your rights as a research participant, you may call the IRB at \_\_\_\_\_

### **Consent to Participate in the Study**

I have read the information provided above and voluntarily agree to participate in this study.

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

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## VITA

Lydia Wiede completed her Bachelor of Science degree in Business Administration at Elmhurst College, Elmhurst, IL in 1983. In 2001, she returned to school to receive a Masters Degree in Counseling Psychology from Northwestern University in Evanston, IL. Upon completing her master's Lydia became a doctoral student in the counseling psychology program at Loyola University Chicago. She completed her Ph.D. in Counseling Psychology in 2011. Throughout her graduate education, Lydia completed numerous clinical training rotations at several agencies and organizations including: Arts of Living/Catholic Charities, Children's Memorial Hospital Outpatient Psychiatry, DePaul University Counseling Center, and multiple rotations at the Loyola University's Sexual Dysfunctions Training Clinic under the direction of Dr. Domeena Renshaw. Lydia completed her APA approved pre-doctoral internship at Illinois State University's Student Counseling Services. In addition to her clinical training, Lydia taught multiple sections of Adolescent Development to undergraduate students at Loyola University. Currently, Lydia works as a Case Therapist in the emergency department of Central DuPage Hospital in Winfield, IL. There, she completes mental health assessments for individuals who present to the emergency department in crisis. Additionally, Lydia works with medical patients to address social needs and she conducts group therapy with patients on the crisis stabilization unit.

## DISSERTATION APPROVAL SHEET

The dissertation submitted by Lydia R. Wiede has been read and approved by the following committee:

Elizabeth M. Vera, Ph.D., Director  
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The final copies have been examined by the director of the dissertation and the signature which appears below verifies the fact that any necessary changes have been incorporated and that the dissertation is now given final approval by the committee with reference to content and form.

The dissertation is therefore accepted in partial fulfillment of the requirements for the degree of Doctor of Philosophy.

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Date

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Director's Signature

