

Advocacy Action

Developing Advocacy in Wakefield District

Strategic Options and Recommendations

12 January 2005 - Second Draft

Introduction

Advocacy is about ensuring that people's voices are heard. It works through a uniquely successful and empowering form of partnership that often manages to make progress where other professional approaches have hit a block or are unable to intervene.

The benefits of advocacy are becoming increasingly recognised across the UK, and this is being reflected in the growth in the number and diversity of advocacy schemes and the increasing focus on advocacy in government legislation and guidance.

For the last two years Wakefield Council, Social Services and Health department, has been funding a project to see how local advocacy schemes could be supported and developed.

The second Advocacy Stakeholder Day was held in November 2004, bringing together many people from across the District who had participated in this project, including advocates, users of advocacy and other services, and representatives of statutory agencies.

This event brought together all the different conversations into an open forum, and was the first stage of setting a strategic direction for the future of the project. Three key agreements were reached:

- the project has been a success so far and should continue
- it should take the form of a development project, rather than simply a network
- it will be called Advocacy Action

Most of the people who have a stake in advocacy in the district are users of services or work in the voluntary sector, and everyone agreed that the project should aim to become properly independent of the Council and other statutory services, while still working closely with them.

This paper outlines the current position in a more strategic format, and sets out some questions and some options for the future.

What have people been saying?

"It's great to be the boss" - member of self advocacy group for people with learning disabilities, speaking at the Stakeholder Day

"That's very interesting, we could do with an advocate here..." many people, in schools, community groups, mental health projects, etc

"What about the Five Towns - that area needs its own dedicated development worker" - participant at World Mental Health Day event in Pontefract

"My client needs an advocate - can you find one for them?" - several Social Workers

"What exactly *is* advocacy?" - this has been an ongoing question, and is a particular issue in Wakefield District

"Advocacy is vital for ensuring the new project boards can work effectively" - more than one senior manager

"My partner needs an advocate because at the moment he's only got me and I've got my own problems so I can't always be there for him" - disabled resident at care home

"I don't need an advocate - the staff here look after me very well" - same care home, different resident

"Can I volunteer?" - several people

"I feel quite lonely in this job - this place needs livening up with more staff - and there's plenty of work to do..." - an advocate

"The idea of a community advocate scheme is great - the advocates will be right there where they are needed, and people will trust them" - a wide range of people

"Why are you talking about a new community advocate scheme when there's so much support the existing projects need?" - an advocate

Vision, Mission and Strategic Aims

Definition of Advocacy

Advocacy is about speaking up or being helped to speak up.
It is about making sure that people have the skills,
confidence and support to stand up for themselves.

A project's vision is often the idea that sets the whole thing in motion. It should continue to inspire the project, and all the people connected to it.

Advocacy Action's vision is of:

**A dynamic and responsive community
of advocates across Wakefield District.**

A project's mission is a long term statement about how it will act to try to make it's vision a reality.

Our mission:

Advocacy Action will:

- 1 -

**Help local people and communities to solve
their problems and be able to live better lives.**

- 2 -

**Help advocacy by getting more of it, helping it to
work better, and making it easier for people to use.**

Moving down to a more practical level, we have the strategic aims. These set out the project's key priorities in the short to medium term. Everything the project does should be clearly related to one or more strategic aim.

Advocacy Action's strategic aims are:

1. **Advocate for advocacy** - provide clear and understandable information and training about advocacy to local people, organisations, and policy- and decision-makers.
2. **Mind the gaps** - continually assess the unmet need for advocacy across the District, and support action to address this need.
3. **Champion good practice** - build on the work of the good practice standards.
4. **Engage with stakeholders** - ensure that developments are widely owned and shared across the District through proper involvement, and through open and accessible decision-making processes.
5. **Establish a comprehensive advocacy resource** - proactively support projects and organisations with the information, support and other resources that they need from time to time.

Operational Objectives

The operational objectives are all tied in to the strategic aims. The operational objectives will not be fully explained and developed until the business plan is completed, but some examples are given in the following table:

Strategic Aim	Operational Objective
1. Advocate for advocacy	<ul style="list-style-type: none"> - Speak up for advocacy projects at District-wide meetings and events, including Wakefield District Partnership and other strategic groups - Offer basic training to service staff who may work with advocates - Disseminate clear and understandable information about advocacy to everyone who needs it
2. Mind the gaps	<ul style="list-style-type: none"> - Set up a project to develop a community advocate scheme - Dedicate time to do practical work with existing local advocacy schemes (e.g. work on business plan, fundraising to expand provision, develop practical monitoring procedures, etc.) - Address current under-involvement of BME groups - Ensure that the east, south, and other outlying areas of the district are properly covered - Encourage diversity of advocacy styles: mix of professional, volunteer, peer advocacy, etc.
3. Champion good practice	<ul style="list-style-type: none"> - Produce easy read version of the good practice standards - Develop supporting materials including a code of practice for advocates and model policies and procedures - Develop engagement protocols to ease co-operative working between local services and advocacy schemes - Provide training and support for implementation of good practice standards - In later years, commission external evaluations of local advocacy schemes
4. Engage with stakeholders	<ul style="list-style-type: none"> - Take information stall to relevant events, community meetings, etc. - Give presentations to community and voluntary groups - Organise regular open events to share feedback and good practice
5. Establish a comprehensive advocacy resource	<ul style="list-style-type: none"> - Build up a library, subscribe to relevant magazines, and provide links to web resources - Offer external supervision and support to advocates as needed, to complement line management - Develop advocacy training programme: Introduction to Advocacy; Advocacy and Negotiation Skills; Approaches to Non-directed Advocacy; Managing Volunteer Advocates; etc.

The objectives will be clarified and developed into SMART objectives as the business plan is written. SMART objectives are: Specific, Measurable, Achievable, Realistic, and Timed. SMART objectives depend on some further decisions about staffing, structure, and budget.

Key Issues

Working in Partnership

During this stage of the strategic planning process, the key issue is ensuring that all the relevant organisations are working together.

Advocacy is an effective way of ensuring that vulnerable people are able to access services, and it is for this reason that Wakefield Council Social Services have been funding advocacy schemes for well over ten years now, and additionally funding this project for the last two years. Advocacy benefits many groups and organisations however, and must remain independent from all of them, so Advocacy Action is looking to work with a broader range of partners as it develops.

There are many key partners for a wide ranging project like this: organisations who directly offer advocacy are joined by statutory and voluntary service providers and by strategic partnerships with overarching responsibilities for the welfare of local people and the coordination of voluntary activity.

Advocacy commonly benefits a wide range of people experiencing barriers to communication, and so groups working with people with all sorts of disabilities, people suffering mental distress, old people or young, or people from any culture will all benefit from developing the advocacy sector in Wakefield.

All information about this project's development is open to view by anybody, but we will make particular efforts to engage with the key partners we have identified. We seek active feedback on this strategy and we seek to develop

agreements that may be incorporated into our business plan. Some of the key partners are commissioners of services, and we will be asking how they think Advocacy Action can become sustainable.

Key partners that have been identified are listed below. Further organisations may easily become key partners simply be engaging in the project's development. (SG) indicates membership of the Steering Group.

Age Concern Wakefield District (SG)
Carers Wakefield District (SG)
Children's Advocacy Service (Barnardo's) (SG)
DIAL Wakefield District (SG)
Eastern Wakefield Primary Care Trust (SG)
Learning Disabilities Partnership Board
Lift Up Self Advocacy Group (SG)
Mental Health Partnership Board
Rasa Advocacy Project (SG)
Richmond Fellowship (SG)
South West Yorkshire Mental Health Trust (SG)
Voluntary Action Wakefield District
VOX
Wakefield District Partnership
Wakefield Infrastructure Partnership
Wakefield Metropolitan District Council (SG)
Wakefield West Primary Care Trust (SG)
PETRA Ltd
Your Voice Wakefield (Mencap) (SG)

Key Issues

Legal Structure

In order to follow the good advocacy practice that we are promoting, we should endeavour to remain independent of local service providers, including Wakefield Council. Up until now the project has been solely financed by the Council, but with the creation of Advocacy Action a wider range of financial support will need to be secured.

Advocacy Action must therefore become properly constituted, and we must choose a legal structure that fits in with its proposed activities. The legal structure defines the ways that an organisation can work in, and provides assurance to third parties that the organisation is properly regulated.

There are three main requirements:

1. Charitable status: enables more funding opportunities and important tax benefits
2. Incorporation: enables the organisation to enter into legal contracts directly (as a corporate body)
3. Limited liability: if we go bankrupt members won't have to pay back our debts (so we'll have to have a good business plan to convince people we'll manage their money well)

There are two alternatives that meet these requirements:

Option 1: Charitable Company

This is the traditional legal form, with many familiar examples. Registered with the Charities Commission and Companies House, these organisations can fall foul of the centuries of legislation that besets these legal structures.

Benefits: Quick and cheap to register; familiar

Drawbacks: Beneficiaries should not be trustees; independent board not so answerable to beneficiaries; complex legislation

Option 2: Industrial and Provident Society for the benefit of the community (IPS)

Developed from mutual and friendly societies, this is the structure of choice for many credit unions (including White Rose) and small housing associations. It is a single legal structure, regulated by the Financial Services Association.

Benefits: Simpler; beneficiaries encouraged to be on management committee; preferential trading with other mutuals (including SWYMHT and Rasa Advocacy Project); more democratic member control

Drawbacks: Slower and more expensive to register; less familiar

Recommendation: Option 2 seems to be more flexible and democratic

Key Issues

Organisational Structure

As Advocacy Action becomes independent of the Council, it faces two options: becoming a fully independent stand alone project, or finding a new home within a more appropriate existing organisation.

Since Advocacy Action is very like a specialist version of Voluntary Action (VAWD), it is useful to imagine it becoming a VAWD project. This would have several notional advantages: it would be quicker and cheaper to set up and run, the management systems are already in place, and we can tap into a lot of expertise.

On the other hand, it would benefit VAWD to have another partner, and we are already working together to deliver an Introduction to Advocacy course as part of the VAWD training programme. There is also plenty of time and funding available to set up a stand-alone project. In fact many funders prefer to support new projects, and since VAWD is already in receipt of funding from several sources that Advocacy Action might independently approach, being too closely linked may limit our options and place further demands on local commissioners.

In terms of democratic control, while VAWD's structures are quite adequate, setting up a dedicated membership and a dedicated management committee will ensure a more comprehensive and transparent focus on Advocacy Action's work.

Recommendation: stand alone project

Membership Structure

The Industrial and Provident Society structure lends itself to transparent and democratic membership control. Members pay a typical annual subscription of £1 and gain full voting rights and eligibility to vote for or stand for election to the management committee. There may be both individual and corporate members.

A charitable company has an independent board of trustees which may be elected by a membership or by the board itself. There is no need to have a wide membership, although charitable companies often do have open membership policies.

There are three membership options for either structure:

Option 1: Membership open to anyone living or working within Wakefield District, and any organisations with compatible aims

Option 2: Membership open to anybody and any organisation involved in advocacy, including users of advocacy, advocates and advocacy schemes, and commissioners of advocacy (other interested parties may get non-voting associate membership)

Option 3: Membership open to recognised advocates and advocacy organisations (non-voting attendance at meetings welcomed)

Recommendation: Option 1 (the most open and democratic, and unlikely to offer any operational handicaps)

Key Issues

Management Committee Structure

There are often special provisions made for management committees, for example a key partner may be assured a place, often a representative of the local authority. It is also often seen as important to ensure proper user representation on committees.

It is proposed that provision should be made for at least half of the management committee of Advocacy Action to consist of people who use or have used advocacy services, and additionally for the Chair to be elected from this group. No more than two of these committee members should come from any one special interest group.

It is not proposed to reserve any other places on the committee for particular organisations.

This user focus is another example of Advocacy Action's commitment to good practice and the principle of advocacy as ensuring people's voices are heard.

The additional resources that will be required to support individuals on the committee is recognised, and will be built in to the business plan.

No options are being presented here, but this is a strategic issue than needs a decision, and any comments or suggestions will be welcomed at this stage.

Linking With Other Local Strategies

Advocacy is basically about ensuring people's voices are heard, and it is often used to help people to access appropriate services. Service providers and staff benefit from being able to communicate more effectively with their clients, and advocacy partners not only get better services, but are often empowered to make other positive changes in their lives.

This is not the only way advocacy practice and principles can make an impact however. The Learning Disability and Mental Health Partnership Boards both use advocates to support their members. The new contract for the Mental Health User Involvement Development Workers has been won by Cloverleaf Advocacy, based in Kirklees. And there are many other interesting and potentially productive possibilities.

In particular, how might Advocacy Action's work support these activities, trends and initiatives in your organisation:

- increasing user involvement and developing the choice agenda?
- supporting victims of crime and engaging in community safety developments?
- developing public health through empowering and inspiring people to take better care of themselves?

These are not options, but broad questions that could be developed productively in future plans.

Feedback and Getting Involved

Feedback on any aspect of this outline strategy is welcomed. Further background papers including the initial action plan and report and a further progress report on the work that has led to this paper are available on request.

Due to time constraints the business plan will need to be completed by mid February, and work will begin on this shortly. The completed business plan will be presented, and Advocacy Action initially launched, at a high profile Advocacy Conference on 2 March.

The wide ranging discussions that have been held over the last two years have given us quite a clear idea of the project's direction, but we are keen to be able to get more concrete commitment from people at this stage so that the business plan will be realistic and able to properly respond to local needs.

Examples of this more concrete commitment are wide ranging, including:

- supporting letters
- offers to become members or management committee members, particularly Treasurer
- help to write the business plan and projected budget
- assistance in drafting a staffing structure, writing job descriptions, and implementing an HR policy
- rough agreements to develop joint training programmes one to three years in the future

- rough agreement to commission us to play a part in developing the district's advocacy plan
- commitment to purchasing staff training in advocacy awareness from us in the future
- agreement to commission a specific staff post within Advocacy Action, e.g. an Eastern area or BME worker
- agreement to provide accommodation for the project on a peppercorn rent for ten years
- agreement to provide a small one off or annual grant towards core costs because you support our work

Other particularly useful support would include suggestions of potential project work Advocacy Action could usefully and appropriately carry out, and which could be incorporated into the business plan, in however rough a form (it could even be something we might develop in three or more years time when the organisation is more mature).

Finally, please tell us about any developing trends that Advocacy Action should be aware of, particularly if they would support our work.

Funding

We are looking for a mixed portfolio of funding, probably mostly drawn from independent sources such as charitable trusts, the National Lottery and Government funding. We would also look for recognition and support from Wakefield Council and the Health Trusts, as commissioners, preferably with some financial element. Other local partnerships and funding would also clearly be useful.

Conclusion

Thank you for taking the time to read and comment on this outline strategy.

If you would like to discuss it in further detail, or discuss the more concrete commitments you might be able to make at this stage, please contact:

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