ESSENTIAL ADVOCACY
Defining Strategy
How did we get here?
Hedgehog
Hedgehog Concept

What are you deeply passionate about?

What you can be the best in the world at

What drives your economic engine
Advocacy
Community Wisdom
Knowledge that is gained by having many experiences in life

Knowledge of what is proper or reasonable: good sense or judgment

The soundness of an action or decision with regard to the application of experience, knowledge, and good judgment
Community

A group of people who live in the same area (such as a city, town, or neighborhood)
The Advocate’s Tools

Investigate
Facilitate
Advocate
Monitor
What takes us off task?
Questions?
Thoughts?
Responses?
What would happen?

**AUTONOMY**
Desire to be Self Directed and Engaged

**MASTERY**
Urge to get better at Stuff

**PURPOSE**
Need for fulfillment
Embedding the capacity for greatness in the people and practices of an organization and decoupling it from the personality of the leader.
What would happen?

**Control** Give control, don’t take control.

**Competence** Create technical competence in the workplace.

**Clarity** Be honest, public, and clear about the organization’s goals.

**Courage** Resist the urge to follow cultural stereotypes of the “in charge” leader
Culture of Ownership and Accountability
I like . . . .

I wish . . . .

What if . . . .
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Imagination is more important than knowledge.
Knowledge is more than an accumulated information.
Albert Einstein
What does it mean to be a CASA Advocate?
Who is the Case Manager?
CHANGE and THRIVE

Change or Die
Embrace not-knowing
Deepen self awareness
Strengthen relationships

Self Leadership*

*Center for Collective Wisdom
CASA COACHING

C – Connect
A – Assess
S – SMART
A – Action

About Coaching

Coaching is an excellent way of developing an advocate’s skills and abilities, and of boosting performance. It can also aid with issues and challenges before they become major problems.

A coaching session will typically take place as a conversation between the coordinator and the advocate (person being coached), and it focuses on empowering the advocate to discover answers for themselves. After all, people are much more likely to engage with solutions that they have come up with themselves, rather than those that are forced upon them!

If we believe that the advocate’s expertise is to bring the “wisdom of the community” to the dependency proceedings then the solution to the advocate’s issue lies within the advocate. The coordinator’s job is to ask questions that draws out the advocate’s solution.

The following is a simple formula and outline for CASA Coaching. It can be used for a five minute conversation or a more lengthy and complex concern. It should be followed in its specific order. All steps are important and should be completed.
C – Connect
Relationship between the advocate and the program is a foundational building block of advocate satisfaction and retention. However, unfocused conversation can waste time and be frustrating. When the coordinator is engaged by an advocate be sure to give the advocate full physical, mental and emotional attention while remembering that this is a business relationship. Set the atmosphere by asking questions like “what do you want to accomplish with our call/meeting?” Determine and clarify ownership, urgency, and significance of issues. Be cognizant of the advocate’s motivational style. Empathize, focus, and listen.

Theory
- **Ownership:** This is the advocate’s case, concern, and idea. The coach gives psychological ownership.
- **Passion:** Is the advocate motivated to pursue it?
- **Urgency:** Does the advocate feel strongly and have a need to act, now?
- **Significance:** Is this important, will it make a difference, will it promote permanency?

Action
- **Set aside your agenda**
- Deep Listening
- Pause to process what was “heard”
- Listen and use silence effectively
- Ask questions to help the advocate find their own answer

Questions
- What would you like to accomplish with our call/meeting?
- What is the best use of our time?
- What is the issue you’re trying to solve?
- How will you know we have been successful?
- Where would you like to go with this?
- How will this advance permanency?
- **Remember the 80 – 20 rule.** If the coordinator is talking more than 20% of the time; the coach is at best giving advice and at worst being directive. In either case it is not coaching.

A – Assess
Acknowledge the current reality. What are the circumstances causing the issue? Are there assumptions being made? Is the issue the advocate is presenting the “real” issue? Then brainstorm options using open-ended questions. Don’t hesitate to present ‘what if’ scenarios. Validate advocate’s ideas. Provide materials to permit the advocate to work through the session using visual/audio/kinesthetic resources to suit his/her learning style. Allow the advocate to reduce options into a concrete direction. Remember Ownership, Passion, Urgency, and Significance.
Theory

- **Create the environment for thinking.** Refrain from answering questions. Ask questions.
- **Give control and encourage autonomy.** If the coordinator does more than 20% of the talking, you’re talking too much!
- **Celebrate mastery.** Find little wins in _every_ conversation.

Action

- Acknowledge the current reality.
- Probe the “presenting” issue. Is it the “real” issue?
- Brainstorm options
- Use open-ended questions
- Adapt your style to the advocates style
- Validate the advocate’s ideas

Questions

- What could you do about this?
- What other actions could you take?
- Let’s go for three potential solutions. What else could you do?
- What if this obstacle was removed? What would you do then?
- What do you think is missing?
- Tell me more about that.
- **Remember the 80 – 20 rule.** If the coordinator is talking more than 20% of the time; the coach is at best giving advice and at worst being directive. In either case it is not coaching.

**S – SMART**

Top-level athletes, successful business-people and achievers in all fields all set goals. Setting goals gives you long-term vision and short-term motivation. Developing sound goals and an action plan is critical to advocate and organizational success.

By setting sharp, clearly defined goals, the coordinator and advocate can measure and take pride in the achievement of those goals, and we will see forward progress in what might previously have seemed a long pointless grind.

Use the fillable PDF SMART Goal form to capture your conversation with the advocate. Use the form just as you would any progress/case notes. The form will guide the conversation. The form will be used for a short conversation and goal or a more complex issue. The value will deepen as you get comfortable using the form and as using the form becomes routine.
Theory

- **Specific**: Can the advocate clearly state what the advocate thinks needs to happen?
- **Measurable**: How will the advocate measure progress?
- **Attainable**: Is it within the advocate’s capabilities?
- **Relevant**: How does it move toward permanency?
- **Timeline**: When is the deadline?

Action

- Allow the advocate to reduce options into a concrete direction/goal
- Use SMART goal worksheet to document the plan and memorialize the conversation
- Create a Culture of Accountability and Ownership

Questions

- What option(s) do you want to pursue?
- What needs to happen?
- What is the most important thing to do here (now)?
- What will you do by when?
- What roadblocks do you expect?
- What is missing?
- What is stopping you?
- **Remember the 80 – 20 rule.** If the coordinator is talking more than 20% of the time; the coach is at best giving advice and at worst being directive. In either case it is not coaching.

**A – Act**

None of the preceding working will accomplish anything without action. Empower the advocate to accomplish resolution to their issue/concern by using their action plan. Anticipate the need for check-ins and schedule follow ups as needed. Assure the advocate that you are available for support. Follow up with the advocate according to agreed-upon timeline to evaluate and review the action plan and outcome. Adjust the action plan as needed. Be willing and available to begin again!

Theory

- Clarify the plans relationship to the goal of permanency
- Listen for equivocal language
- Empower the advocate to accomplish resolution using their action plan
- Anticipate and assume the need for check-ins
- Assure the advocate that you’re available for support
Action

- **Clarity:** Advocate knows exactly what to do
- **Timeline:** Check-ins are calendared
- **Commitment:** Advocate will execute the plan
- **Deadline:** Advocate has a completion date
- **Celebration:** Know when and how you will celebrate all the advocates small wins

Questions

- Are you ready to commit to the plan?
- What did you learn about yourself today?
- When should we check-in?
- How should we handle accountability?
- How should we celebrate your success?
- **Remember the 80 – 20 rule.** If the coordinator is talking more than 20% of the time; the coach is at best giving advice and at worst being directive. In either case it is not coaching.
As a Court Appointed Special Advocate I am appointed by a Judge to serve as the investigative arm of the court and the voice of the child, therefore,

**I PLEDGE** to see my CASA child a minimum of once per month;

**I PLEDGE** to conduct a thorough investigation and provide a child-centered, fact-based Report every month, advocating for the child’s permanence, safety, and well-being;

**I PLEDGE** to actively participate in court hearings and meetings for the child;

**I PLEDGE** to maintain monthly contact with my CASA Coordinator and submit my reports and hours by the 5th of each month;

**I PLEDGE** to complete 12 hours of training annually to develop my professional knowledge to better serve the child;

**I PLEDGE** to make two new advocate volunteer referrals every twelve months as long as I continue with the program:

**I PLEDGE** to serve as the “one constant” for the child, assisting with all transitions until the child achieves permanency.

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CASA
Court Appointed Special Advocates
FOR CHILDREN

YELLOWSTONE CASA
Based on “Greatness” by David Marquet

How can you, as paid staff, demonstrate giving CONTROL to a peer coordinator and advocate?

- Support PC and advocate ownership
- Create a culture of accountability
- Clear expectations and guidelines – use pledges
- Active listening
- Encourage risk taking – allow for mistakes – facilitate self-correction

How can your actions as paid staff be measured?

How can you, as paid staff, demonstrate the COURAGE to resist your urge to follow cultural stereotypes of the “in charge” leader?

- Reinforce PC and advocate ownership by delegation of authority
- Empower through trust
- Exercise humility and patience
- Self-reflection, self-confidence, and mindfulness
- Welcome what arises
- Active listening
- Accept mistakes
- Celebrate little wins

How can your actions as paid staff be measured?
How can you, as paid staff, create technical COMPETENCE in a peer coordinator and advocate?

- Training – Pre-service, in-service, and individual
- Clear goals
- Use pledges – non-negotiable
- Self-assessment for advocates, PC
- Practice – Practice – Practice
- Reframe to “see” successes
- Promote common sense – Community Wisdom
- Easy access to resource lists

How can your actions as paid staff be measured?

How can the actions of PCs and advocates be measured?
How can you, as paid staff, create **CLARITY** around the organization’s goals?

- Uniform/written policies for all staff, paid/unpaid and advocates
- Define Safety, Permanency, and Well-Being
- Repeat – Review – Reinforce
- Develop milestones – facts – goals
- Seek and receive feedback

How can your actions as paid staff be measured?

How can the actions of PCs and advocates be measured?
The Rebirth of an Eagle
https://www.youtube.com/watch?v=yXTvWPvP0iQ

Greatness
https://www.youtube.com/watch?v=OqmdLcyES_Q

Motivation
https://www.youtube.com/watch?v=u6XAPnuFjJc

Dancing Guy
https://www.youtube.com/watch?v=fW8amMCVQJQ

The Tree
https://www.youtube.com/watch?v=GPeZ6viNgY

Dare To Dream
https://www.youtube.com/watch?v=HhFxQIDPjaY
As a Peer Coordinator I am entrusted by the program to serve and support the assigned Advocates. I understand that my role is that of servant leader and therefore,

I PLEDGE to actively listen and support assigned Advocates to the best of my ability;

I PLEDGE to use good coaching techniques whenever possible and limit directive supervision to a minimum;

I PLEDGE to support Advocates in court hearings and meetings for the child as needed and assure the Advocate that she/he can stand on their own;

I PLEDGE to maintain monthly contact with assigned Advocates and receive their reports and hours by the 5th of each month;

I PLEDGE to complete 12 hours of training annually to develop my professional leadership knowledge to better serve the Advocates;

I PLEDGE to recommend three Advocates to be Peer Coordinators every twelve months as long as I continue with the program:

I PLEDGE to serve the Advocates in the program to the best of my ability knowing that retention is the key to serving every child and youth in need.
Based on Motivation by Daniel Pink

**AUTONOMY:** The desire to be self-directed and engaged
- Set and share expectations
- Provide feedback – Praise strengths and reframe challenges
- Know the goals
- Encourage independent action within organization goals and structure

How can your actions as paid staff be measured?

How can the actions of PCs and advocates be measured?

**MASTERY:** The urge to get better at stuff
- Encourage, support, and require in-service education, research for resources, and skill-building
- Ask more questions – use questions to encourage problem solving
- Encourage practice and diligence
- Is the PC and/or advocate having fun?

How can your actions as paid staff be measured?
MASTERY: The urge to get better at stuff (continued)

How can the actions of PCs and advocates be measured?

PURPOSE: The need for fulfillment

- Self direction to accomplish goals of Safety, Permanency, and Well-being
- Clarity of case goals
- Connect clearly to mission
- Ask are you enjoying the work?

How can your actions as paid staff be measured?

How can the actions of PCs and advocates be measured?
COACHING: Online Quizzes – part of the online training

Coaching readiness quiz
http://www.coachingandmentoring.com/Quiz/coaching.html

Influence quiz
http://www.coachingandmentoring.com/Quiz/Influence6e.htm

COACHING/LEADERSHIP: Online Videos with questionnaire follow up:

Dan Pink: Motivation
https://www.youtube.com/watch?v=u6XAPnuFjJc

David Marquet: Greatness
https://www.youtube.com/watch?v=OqmdLcyES_Q

BIBLIOGRAPHY:

Leadership Ladder

Good to Great (Executive Summary)