

Hot tips on being an effective advocate

Article by Karyn Chalk, August 2021



Over the last 5 years I've supported people in over 150 disciplinary meetings. I've learnt some lessons along the way and significantly changed my approach everything. This article focuses on attitudes, beliefs and my learnings (humbling experiences) along the way.

It's a privilege to be asked to be an advocate. It signifies that the person trusts you enough to stand beside them in a situation that may be uncomfortable, emotional and close to their heart. Being an advocate requires a multitude of different skills which are complex and nuanced. Today, we are going to investigate some of these influential skills at both a conscious and unconscious level.

Firstly, I'd like to introduce the 'Problem Ownership' model of decision making which regularly guides my practice. I like the model and strategies within it so much I wrote a book about it and used it to significantly change my relationship with my teenage daughter when times were tough. People brought over 2000 copies of the book and I ran a number of

parenting talks around the country. For a free copy of this book go to www.changingways.co.nz. At the time I had no idea that this work would be so influential when I became an advocate.

The problem ownership model was designed by Dr Thomas Gordon who was an award-winning psychologist and three-time Nobel Peace Prize Nominee. He's probably best known for his *Parent Effectiveness Training* (1977). Put simply, the problem ownership model is about identifying who is OK and who is not OK in the current situation. Once you identify where the problem sits on the grid, there are specific skills and strategies relevant to each box. It's a simple methodology and very relevant in the role as an advocate.



First box – Both of you are OK and there is no problem.

This box is for when you and the other person are OK. In this situation you can see parties using reflective listening techniques, doing what they said they would do, and building trust, rapport, safety and credibility over time. The more rapport the parties have, the easier it is to resolve other conflicts that may arise in the future. I see it like beans in a jar, it's easier to take some out when you have some already in there to start with.

Second box – Other person is not happy. They own the problem.

In this box it's the other person that is unhappy with the situation. For example, your work colleague has been called to a meeting to discuss their performance. Or, they are upset with how a patient has been treated. Or, annoyed about an action another person took without consulting them first. The skills to utilise here are helping and coaching skills to listen to the issues and, if required, assist the other person to resolve the issue themselves.

Third box. I'm not happy. I own the Problem.

In this box it's me that's unhappy and it's me that has the issue with someone else. For example, I might be unhappy that my roster has been changed without consultation. Or, I might be unhappy about a conversation I heard in the staff room. As I own the problem, it's me that needs to decide what I want to do about it and how I want to approach the situation.

In this box the skills of assertiveness and problem solving may be required to choose the appropriate time and place to voice my concerns and stay in rapport with the other person.

Fourth box. Both parties are unhappy. Conflict.

In this box there is disagreement going on between both parties. It can take a lot of time and energy from both parties to get resolution once you have arrived in this box. This is because 70% of conflict occur because there is a clash in values which can cause emotions to run on high volume and emotionally charged issues become harder to resolve. Hence the aim is to utilise the skills in the other 3 boxes to avoid getting into this box in the first place!

Where does advocacy sit in the problem ownership model?

If you are advocating for another person then there is an issue that they need some assistance resolving. In terms of the problem ownership model, if it is the other person who is upset, it's their problem. Ideally your role is to help them resolve the issue, NOT do it for them. Therefore, you need to be a bit distanced from the situation because:

- You want the person who is upset to be able to effectively articulate their concerns AND;
- You want to assist the other person to resolve the situation in a way that gets them the best possible outcome, AND
- You want to be the wise person in the room, the sun-drenched rock in the middle of the river.

To achieve this you need to utilise the skills and strategies in the first two boxes of this model: rapport and coaching skills.

Why?

The goal is to:

- Empower the other person to take an active part in their own life, the lives of their whānau and others.
- Create opportunities for their dignity and mana to be restored and rebuilt.
- Advocate from the perspective of that person.
- Help them to voice their concerns that aligns with a resolution based on what success looks like to them.
- Help them to voice their concerns, heal the past and open possibilities for a different future
- Learn that by voicing their concerns with you by their side, then maybe they can voice them at other times in the future also. This is called personal agency.

What happens if you as the advocate are also emotionally invested in the situation?

You may not like what is happening in the situation and it may upset you to see how your colleague is being treated. And, the situation may not align with your values.

However, your role in this situation is that of an advocate. You have to be able to put your responses to the side. Its not easy at times and you may need to learn 'how' to calm your brain so that you don't get emotionally hijacked in the situation.

Here's how an example of how a meeting can play out if you get too invested, too annoyed, too frustrated and emotionally hijacked.

1. You have been asked to attend a disciplinary meeting with a colleague. You see the letter from management and you simply can't believe what is written in it. How dare they say that about her? And, you are even more furious that management has decided to bring a lawyer into the meeting.
2. You go into the meeting feeling really annoyed.
3. Then in the meeting your colleague is told she will be stood down until a full investigation has been completed.
4. You can't believe what you have just heard!!! You confront the manager about her decision.
5. You and the lawyer then have a heated debate about how an investigation process should be conducted.
6. You leave the meeting upset with the result. That night you don't sleep as you are worried for your colleague and embarrassed about your behaviour.

So, what just happened?

- Before you even went into the meeting it's likely that you were in the wrong box of the problem ownership model.
- Your colleague's problem has become your problem and, in the heat of the moment, you got emotionally hijacked.
- By confronting the manager and lawyer in an emotional state you added a whole new problem into the room.
- Alongside this, because you went into the meeting feeling annoyed your pulse has probably increased above 95 beats per minute. This will have hindered your ability to listen and think rationally.
- The opportunity for you to be the wise person in the room and help your colleague articulate herself to get the best outcome possible outcome has become compromised.

Hot tips on being a successful advocate:

"It's better to be an angel at the side-line than a train wreck in the middle of the room".

- As the advocate you are there to support a member who has an issue that needs some form of resolution
- And if there is an issue then there will be often be differences in perspective from members at the table
- And if there is an issue that is causing the member to be upset to the point, they feel they need an advocate, you can guarantee that there are some difficult emotions present

Below is a list of hot tips I've learnt along the way.

1. **Get some beans in the jar.** It's beneficial to have functional relationships with managers as an advocate as it builds rapport, trust and credibility. Each of these interactions is like putting beans in the jar. It's much easier to cash in when there is a savings bank. And it's much easier to resolve difficult situations when there is a layer of trust, credibility and rapport as a starting block.



2. **Slow down and advocate.** Sometimes if we have an emotional response to the situation our brain may be tricked into thinking the matter is urgent and immediate action needs to occur. Be conscious in slowing things down to ensure a calm and structured process can occur.



3. **Check out the vacancy status.** Your colleague might come to you upset about being called to a meeting. You may look at the letter and feel a sense of injustice and resentment. The risk then is to jump on the horse and gallop into the sunset of problem resolution.

Meanwhile, your colleague may not even want any assistance from you at the meeting. She might just want a moan, groan and some advice. I find it helpful to imagine that people walk around with vacancy and non-vacancy signs above their heads. It's important to take the time to get an understanding of what kind of support they require from you at this time.

4. **Get to the bottom of the real issue.** An important lesson I continue to reflect on is the importance of remembering that the original problem is often not be the actual issue. Your colleague may have been given a letter that outlines concerns from a customer and outlines a number of business policies that may have been breached. And naturally your colleague may launch into writing up her step-by-step account of the situation actions. Whilst this might be a good starting point in self-reflection, what if this is not the problem? From attending over 150 disciplinary meetings, my experience is 90% of the time the issue is 'how' the person responded to the situation when they were stressed, tired or coping with external pressures. If you want the best outcome for your colleague then taking the time to get to the bottom of the issue can be gold because it will influence the meeting outcome.
5. **Preparation, preparation, preparation.** If the issue is based around communication style and response, I've found the ability to self-reflect, show insight, take

responsibility for actions, acknowledge impact on others, and outline future assistance needed cannot be underestimated. Sometimes this requires meetings to be rescheduled so that the person has the space to prepare what to say and how to respond.

6. **What self-care plan is needed?** It's also important to understand that in this situation your colleague can be feeling very distressed. Having a conversation about self-care and additional assistance such as EAP or Vitae can also be helpful.
7. **Solid preparation provides stability.** Encourage your colleague to outline what they are going to say in clear and succinct bullet points. This will provide a reference point if they get stuck and you can also support them to work through each point.

8. **Be conscious of your own presence in the room.** Difficult situations can often trigger people into big emotions such as shame, humiliation and embarrassment. Your role is to be the wise person in the room. John Gottman (2015) an American psychological researcher and clinician did extensive work over four decades on divorce prediction and marital stability. His research involved monitoring people in conflict with equipment such as heart rate monitors and ECG's. His research team discovered that any time your pulse gets over 95 beats per minute you get emotionally flooded and lose the ability to resolve conflicts effectively. This is because the amygdala (the fight/fight part of your brain) starts running the show. Your job as an advocate is to be the wise person in the room and create a calm presence through your body language, voice tone and slow deliberate breathing patterns. You can maintain a calm and safe space without saying anything when you are deliberate with your nonverbal cues.



9. **Understand your own triggers.** As discussed above, you want to stay in the top two boxes of the problem ownership model. One guaranteed way of bailing ship is getting yourself emotionally triggered. Take the time to understand what your triggers are. For example; one of mine is when the person I'm advocating for is getting a tougher level of punishment than what I feel is fair and reasonable. I recognise the body signs and have calming strategies in place to help with this.

In Summary

Advocating for others requires you to be conscious of your language, your body language and your responses. It's important to keep yourself safe: slow down, take time getting clear

on what support is required, clarify what the issue really is and determine what preparation needs to happen before any meetings occur.

As an advocate you also need to have done some preparation in understanding your own triggers and having some calming strategies to ensure you maintain being the wise person in the room. My experience is that this growth occurs with the ability to self-reflect and utilisation of peer, clinical or professional supervision.

References

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ABOUT THE AUTHOR: KARYN CHALK

Karyn Chalk lives in Dunedin, New Zealand. She has qualifications in Applied Science (Human Nutrition), Education and Dispute Resolution, combined with 25 years' experience in Neuro Linguistic Programming (NLP) and Havening techniques©. Karyn is able to masterfully combine her theoretical knowledge and practical coaching experience to tailor her approach for outstanding results. She has a natural ability to reach the heart of a wide range of problems in a relaxed, pragmatic and friendly way.

Contact Karyn at: www.changingways.co.nz

