



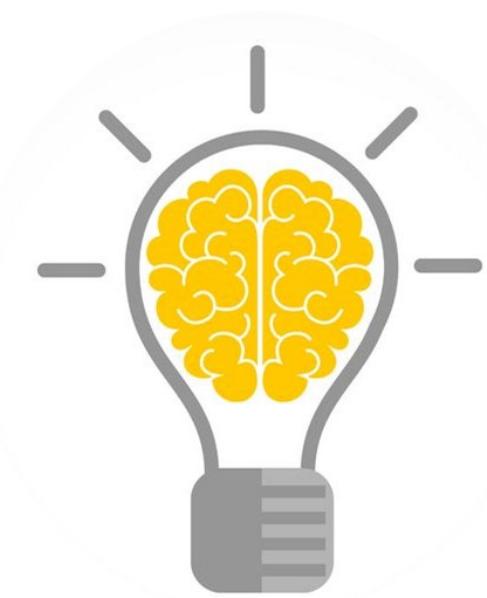
# SUPPORTING SELF-ADVOCACY AMONG RIDERS AND CLIENTS

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# LEARNING OBJECTIVES

- Understand what Self-Advocacy is and how it can improve a situation
- Identify Self-Advocacy Core Skills
- Practice strategies for supporting clients
- Develop an Action Plan



# DID YOU KNOW....

**You are a self-advocate** if you have ever spoken up for what you believe in.

**You are a self-advocate** if you have taken responsibility for your life in some way.

**You are a self-advocate** if you have ever questioned people's expectations of you.

**You are a self-advocate** if you have ever joined a self advocacy group and believe that the group's work is going to make life better for people.

# DEFINITION OF SELF-ADVOCACY

**“Speaking up for oneself and one’s interests.**

**“The term arose in the broader civil rights movements of the 60s and 70s; part of the disability rights movement.”**

- Wikipedia

Self-Advocacy:  
Know Yourself,  
Know What You  
Need, Know How  
to Get It

# TRANSPORTATION SELF-ADVOCACY

- Lack of transportation affects many parts of a person's life, including employment, healthcare, accessing public benefits, and socializing
- Many benefit programs and services assume access to a vehicle
- Self-advocacy on the part of riders and clients can improve their ability to get where they need to go

The role of mobility managers and transportation professionals is to support the people we serve in advocating *for themselves* to have their transportation needs met.

# WHAT ARE THE ADVANTAGES OF SELF-ADVOCACY?

- More control over decisions.
- Gaining self-confidence and self-respect.
- Building allies.
- Experiencing teamwork.
- Learning to properly express needs to achieve goals.
- Developing conflict resolution and creative problem-solving skills.

# WHO IS A PROVIDER?

- Primary Care Provider or staff
- Medical Specialist or staff
- Mental Health Provider or staff
- DSS Staff
- School Staff
- CPS Staff
- Care Manager



# WHAT ARE THE BARRIERS TO SELF-ADVOCACY?

- Lack of support and education.
- Lack of access to information on self-advocacy and self-determination.
- Lack of opportunities to exercise choice or take risks.
- Low expectations of an individual's capacity to know what is best for that individual.
- Societal attitudes that marginalize or devalue individuals, i.e. bias, judgment.



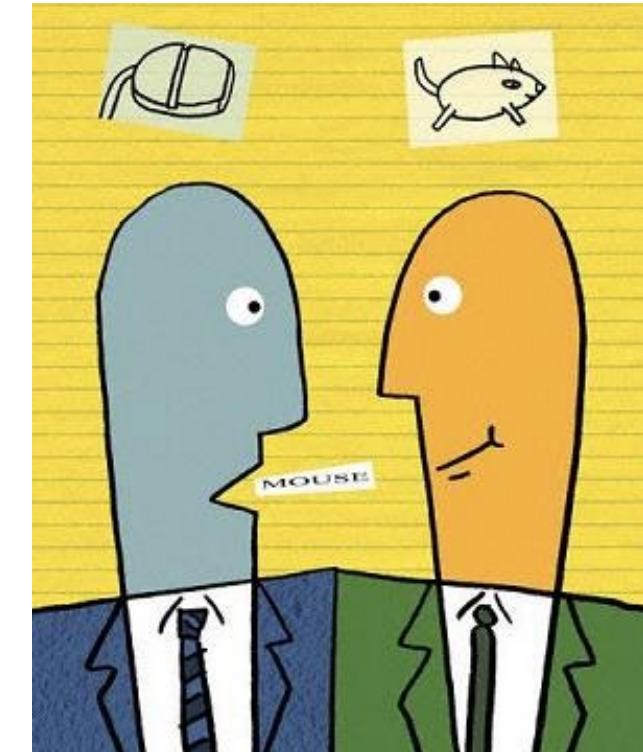
21%

**OF NON-INSTITUTIONALIZED, ENGLISH-SPEAKING US ADULTS  
HAVE EXPERIENCED DISCRIMINATION WHILE SEEKING MEDICAL CARE**

Self-advocacy is an important skill for people to learn so that they can respond when they experience discrimination.

# WHY DO COMMUNICATION ERRORS HAPPEN?

- Lack of self-confidence and/or experience
- Fear of open dialogue
- Limited appointment time (perceived or actual)
- Technical jargon
- Embarrassment
- Breakdown in the sharing of information between providers
- Providers seem to be too important or busy to listen
- Providers ignore or minimize concerns



# SELF-ADVOCACY SKILLS

- Self-Awareness
- Effective Communication
- Conflict Resolution
- Record-Keeping



# 1. SELF-AWARENESS

- What am I feeling?
- What am I thinking?
- What am I doing?



“DON'T COMPROMISE  
YOURSELF. YOU'RE ALL  
YOU'VE GOT.”

– JANIS JOPLIN

“Self-Awareness is the ability to focus on yourself and how your actions, thoughts or emotions do or don’t align with your internal standards.”

**Psychologists Shelley Duval and Robert Wickland**

“In our personal lives, if we do not develop our own self-awareness and become responsible for first creations, **we empower other people and circumstances to shape our lives by default.**”

**Stephen Covey**

# SELF-AWARENESS IS THE KEY TO SELF-ADVOCACY

- **When we are self-aware, we are able to recognize our strengths and weaknesses.**
  - This helps us set our goals.
  - Knowing your strengths increases your confidence.
  - Allows you to recognize what you can...and cannot...do

# PRIMARY BENEFITS OF SELF-AWARENESS

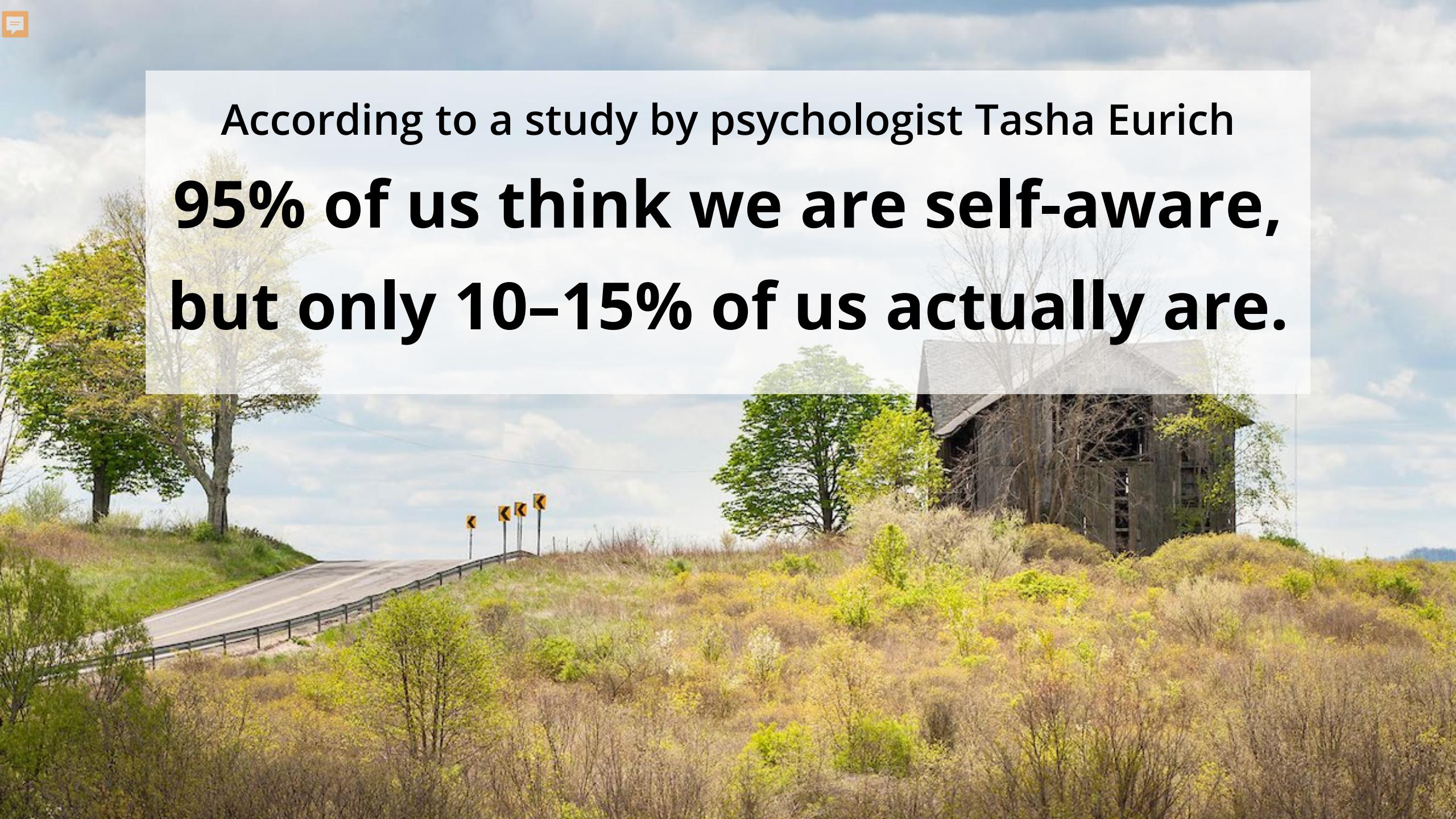
- Gives you a better understanding of what you want and/or need
- Increase your chances of getting what you want and/or need
- Improve your decision making
- Help you manage your emotions
- Lead to healthier reactions to external factors
- Boost your productivity and success
- Enhance your ability to make positive change
- Bolster your self-esteem
- Strengthen relationships

# Self Awareness Poll

**How self aware are you?**

**Options:**

1. I am extremely self aware - I don't miss a thing.
2. I am self-aware enough to know that I am not always self-aware because humans are hard-wired to lack that trait.
3. Sometimes I know what I'm feeling but not always.
4. I am not very tuned in to my actions, emotions or thoughts.

A scenic landscape featuring a winding road on a grassy hillside. In the background, there are several trees and a large, old wooden barn on a hill. The sky is blue with some clouds. A white rectangular box is overlaid on the upper portion of the image, containing the text.

According to a study by psychologist Tasha Eurich  
**95% of us think we are self-aware,  
but only 10-15% of us actually are.**

**SCENARIO:** A client's follow up appointments need to be scheduled on days when transportation is available

**How can we coach the client to be prepared?**

- **Client's Self-Awareness** - What are their needs and strengths in this situation?
- Remind them of rules and schedules for transportation (e.g. Medicaid needs 3 days notice)
- Affirm that they are the expert on their own life

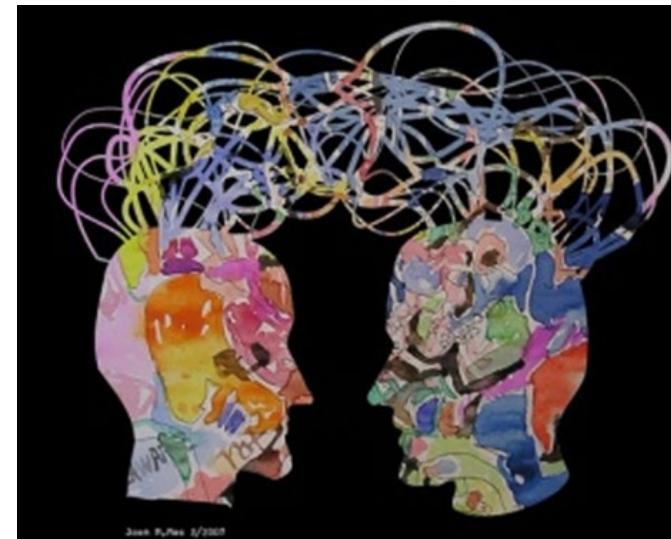
## 2. EFFECTIVE COMMUNICATION

- The presentation of ideas, thoughts, knowledge and information in a way that is understood by the recipient.
- It's not about winning a debate, but rather about understanding both sides.
- Effective communication when working with providers can be challenging for both sides.

# EFFECTIVE COMMUNICATION

Effective Communication goes both ways – if something is not clear to you, ask clarifying questions.

- **Are you saying...?**
- **Can you repeat...?**
- **Where do I...?**
- **Is it ok if...?**
- **What if...?**

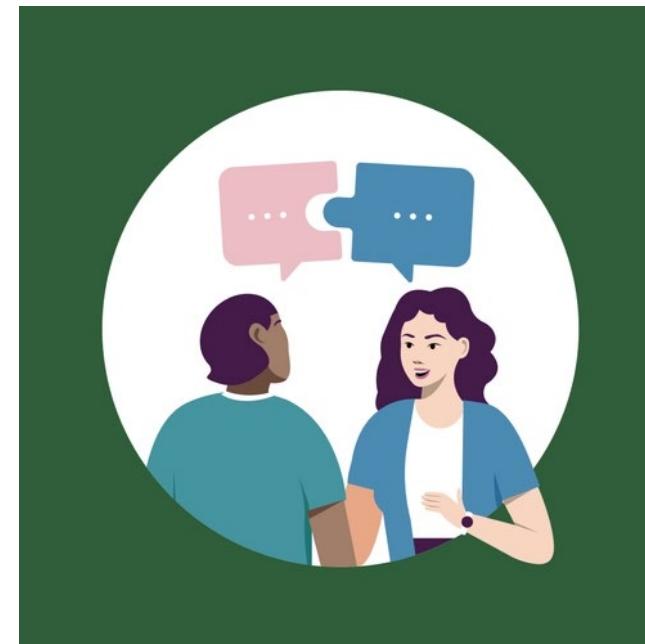


# LISTENING SKILLS

- Clarification: if you are unsure what they mean, ask them!
- Reflection: Repeat back what you think you heard, and ask if that's what they meant.
- Body Language: this includes the tone and pitch of voice, body movement, eye contact, posture, facial expressions

# KEYS TO EFFECTIVE COMMUNICATION

- Be consistent with verbal and non-verbal communication.
- Clear and concise delivery of your message.
- Knowledge of your topic.
- Know your audience.
- Be open to feedback.



# COMMUNICATION STYLES



# COMMUNICATION STYLES

- **Aggressive** communicators often speak loudly, maintain intense eye contact and control others through blame, intimidation or criticism.
- **Passive** communicators often display a lack of eye contact, poor body posture and an inability to say “no.”
- **Passive Aggressive** communicators seem passive on the surface, but will likely mutter to themselves as they walk away from a person or situation.
- **Assertive** communicators try to balance one's own rights with the rights of others.

# COMMUNICATION STYLES

Which type of communicator is represented in each of the following statements?

- You never do anything right
- I'm unable to stand up for myself
- I don't mean to be rude, but...
- You owe me
- Thanks for thinking of me but I am going to have to say no this time.
- People never consider my feelings
- Well, if you like it...

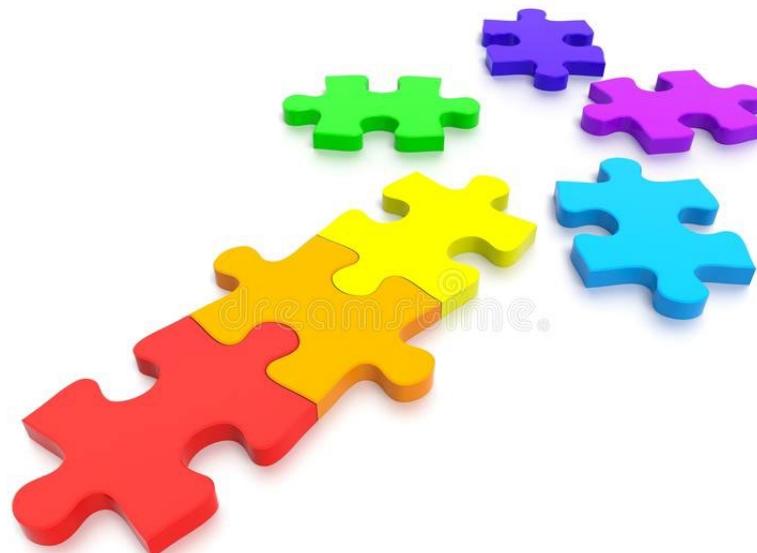
**SCENARIO:** A client's follow up appointments need to be scheduled on days when transportation is available

**How can we coach the client to be prepared?**

- **Effective Communication** - What needs to be communicated, and in what way?
- Encourage them to speak up if assigned an appointment time or location that does not fit transportation needs
- Practice with them, if helpful

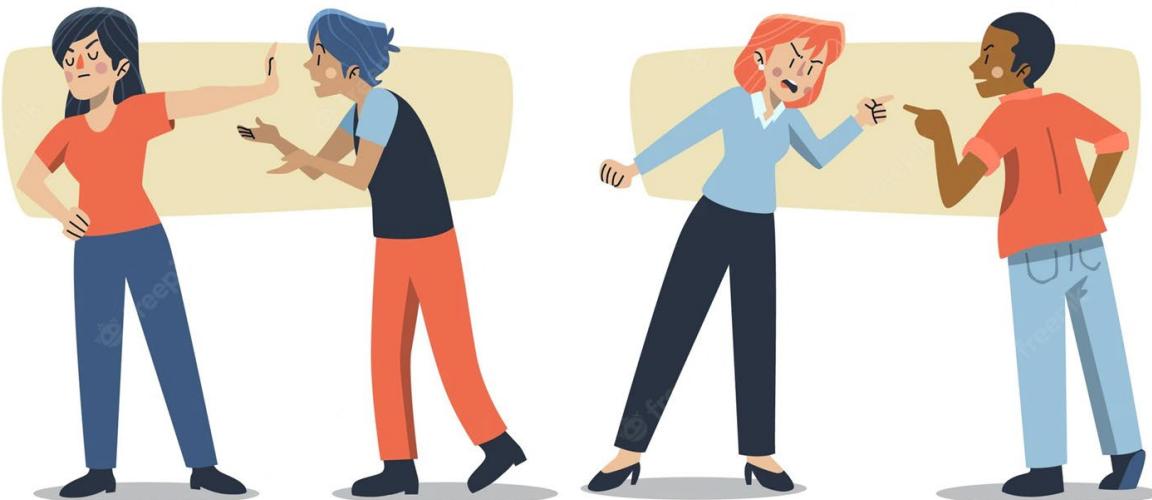
# SELF ADVOCACY, SELF AWARENESS AND EFFECTIVE COMMUNICATION

## Putting it all together



# 3. CONFLICT RESOLUTION

- Conflicts can arise with any provider
- Since relationship conflicts are inevitable, it is imperative to learn to deal with them in a respectful, productive manner.



# CONFLICT STYLES

## Avoiding

Pretending it didn't happen

## Giving In

Accommodates the other person, but you may not get what you want

## Standing Ground

Conversation becomes a battle to be won

## Compromising

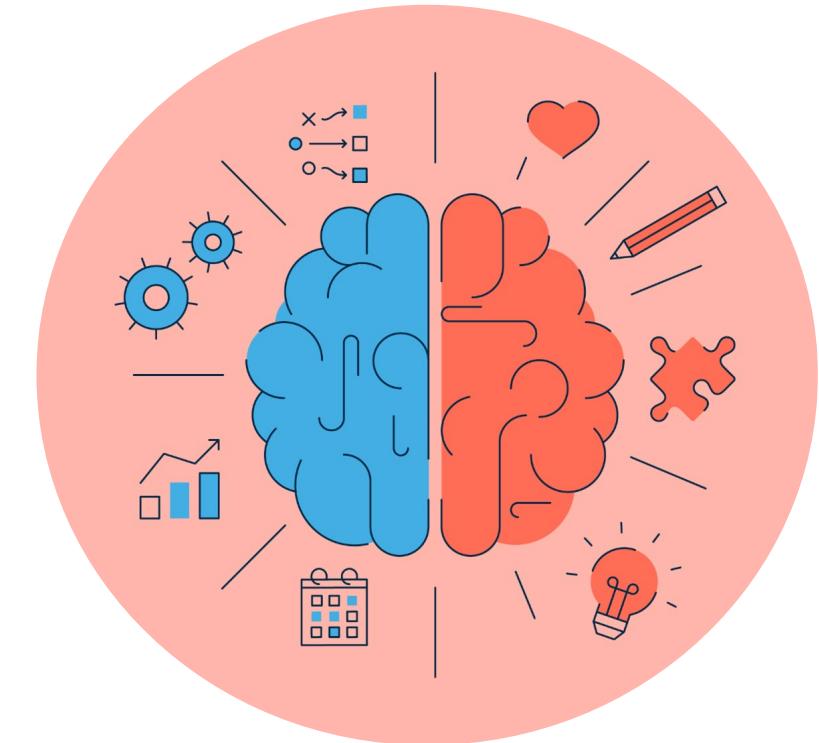
Agreeing to negotiate larger points and let go of smaller points, can lead to resolution

## Collaborating

Requires listening, discussing goals, and creative thinking - all parties understand each other

# CONFLICT RESOLUTION CORE SKILLS

- Acknowledge the conflict
- Identify the issue
- Parties meet to discuss the issue
- Identify a solution
- Put the solution into play



# CONFLICT RESOLUTION STRATEGIES

- Remain clear, concise and calm
- Remain in control of emotions and behavior
- Pay attention to the verbal and non-verbal cues of others



**SCENARIO:** A client's follow up appointments need to be scheduled on days when transportation is available

**How can we coach the client to be prepared?**

- **Conflict Resolution** - What issues might arise, and how will we react?
- Hear their concerns about potential pushback from providers
- Brainstorm solutions that will work for them (e.g. a different day or time) that they can share

# 4. RECORD KEEPING

- The act of keeping track of the history of a person's activities by creating accurate, consistent records.
- Your records are the best documentation of your attempts to resolve your situation
- Phone conversations, correspondence and face-to-face meetings



# Record Keeping for Medical Appointments

## Going into an appointment:

- Medication Lists
- Symptoms
- Test results
- Any other information provider should be aware of

## Leaving an appointment:

- Changes to medications
- Diagnoses
- Test results
- Referrals

# PHONE CONVERSATIONS

- When engaged in a phone conversation, document the date, the individual's name and title, and what was discussed, as well as if the person was helpful or not.
- If you must make multiple attempts to reach an individual, document those as well.
- If the individual is unable to respond to your concerns at the time of your conversation, ask for a date that you can expect a response and record that date. If you don't hear back, call again.
- Ask for an email address so that you can summarize conversation in writing. If dissatisfied, ask for supervisor's name

# RECORD KEEPING FOR FACE-TO-FACE MEETINGS

- Preparation is key. As simple as it sounds, be sure to write down the date and time of the meeting as soon as it has been set.
- Ask what documentation may be needed for the meeting; write it down so you don't forget anything.
- Prepare an agenda of what you want to discuss.
  - What do I want to happen?
  - What do I want to learn?
  - What could happen as a result?
- Take someone with you! They can not only support, but help keep notes of what is said.

# RECORD KEEPING FOR FACE TO FACE MEETINGS

- Document any promises made by the other person, including time frames.
- Document any actions you must take, including time frames.
- Document any explanations given regarding outcomes – whether a denial or an approval.
- Document anything supportive that is said.
- If time frames come and go, contact individual and reference the date of the meeting and restate promises made.

**SCENARIO:** A client's follow up appointments need to be scheduled on days when transportation is available

**How can we coach the client to be prepared?**

- **Recordkeeping** - What key information needs to be collected?
- Keep track of appointment times and communication with transportation providers in case there is an issue
- Ask at pickup if they have everything they need

**SCENARIO:** A client's follow up appointments need to be scheduled on days when transportation is available

**How can we coach the client to be prepared?**

- **Client's Self-Awareness** - Remind them of rules and schedules for transportation (e.g. Medicaid needs 3 days notice)
- **Effective Communication** - Encourage them to speak up if assigned an appointment time or location that does not fit transportation needs; practice if helpful
- **Conflict Resolution** - Brainstorm solutions that will work for them (e.g. a different day or time) that they can share
- **Recordkeeping** - Keep track of appointment times and communication with transportation providers in case there is an issue. Remind about documents.

# HELPFUL HINTS FOR EFFECTIVE SELF ADVOCACY

- Know your rights and responsibilities
- Learn and understand the system
- Don't assume anything/Question everything
- Start a paper trail
- Don't wait!





# PUTTING SELF-ADVOCACY INTO PRACTICE

**Discuss:**

What situations do your clients face that call for self-advocacy?

# SAMPLE ACTION PLAN

- Define your area of concern
- Determine tasks to be undertaken to address the concern
- Is there documentation needed?
- Are there other people who can help?
- Follow up strategies
- What is the expectation of the other side?



# SAMPLE ACTION PLAN

- **Define your area of concern**
  - Medicaid covers transportation, but Form-2015 is required first
- **Determine tasks to be undertaken to address the concern**
  - Obtain the form, educate provider on the need for the form
  - Ensure that provider submits the form in a timely manner
- **Is there documentation needed?**
  - Form-2015, fax numbers, online portal access
- **Are there other people who can help?**
  - Provider's office staff, mobility manager, caseworker
- **Follow-up strategies**
  - If rejected, check the medical justification and ask provider to resubmit
- **What is the expectation of the other side?**
  - Long-term solution for transportation to appointments

- **Define your area of concern**
  - What will you advocate for?
- **Determine tasks to be undertaken to address the concern**
  - Is there information to gather? What personal strengths (skills, knowledge, experience) are you bringing to the table? What will be your first step?
- **Is there documentation needed?**
  - Have a plan for staying organized
- **Are there other people who can help?**
  - A support system can include people or organizations
- **Follow-up strategies**
  - What will you do if the issue is not resolved right away?
- **What is the expectation of the other side?**
  - Do you have a goal in mind?

# REFLECTION

- List 2 things that went well, and 2 that did not
- How self-aware were you through this process?
- How well did you communicate?
  - Were you passive, aggressive, or assertive?
  - Did the people you reached out to respond well to your approach?
- Did you keep notes and ask for copies of your files?
- Do you feel like any of your goals were met?
- What would you do differently next time?

# LET'S REVIEW

- The meaning of Self-Advocacy
- 4 skills that are key to successful self-advocating: self-awareness, effective communication, conflict resolution, and record keeping
- Using the helpful hints for effective Self-Advocacy as a reference to share with others
- Begin creating your own personal Action Plan, which you may find helpful for any future advocating you do.

**QUESTIONS?**



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**#SALUDTUES**  
tweetchat

## Addressing Inadequate Transportation to Improve Health

**1 pm ET, Tuesday, Oct. 3, 2023**

Host: @SaludAmerica  
Co-hosts: @nat\_rtap, @SIREN\_UCSF, @SharedUseCenter, @NADTCmobility

Co-hosted by National RTAP, NADTC, SUMC, Salud America, and UCSF's Social Interventions Research & Evaluation Network. Join the chat on X (formerly Twitter) on **October 3 at 1pm ET** with the hashtag **#SaludTues**.

## LinkedIn Learnalong : Communication Focus

*October 19, 2:00-3:00 PM ET*

Participants will watch 3 short videos related to communication on National RTAP's LinkedIn page. Moderators from our Review Board will then lead a discussion about applying these lessons to transit scenarios.



5<sup>th</sup> National RTAP Conference  
**Navigating the Tides of Change  
with Rural & Tribal Transit**



**December 3-6, 2023**

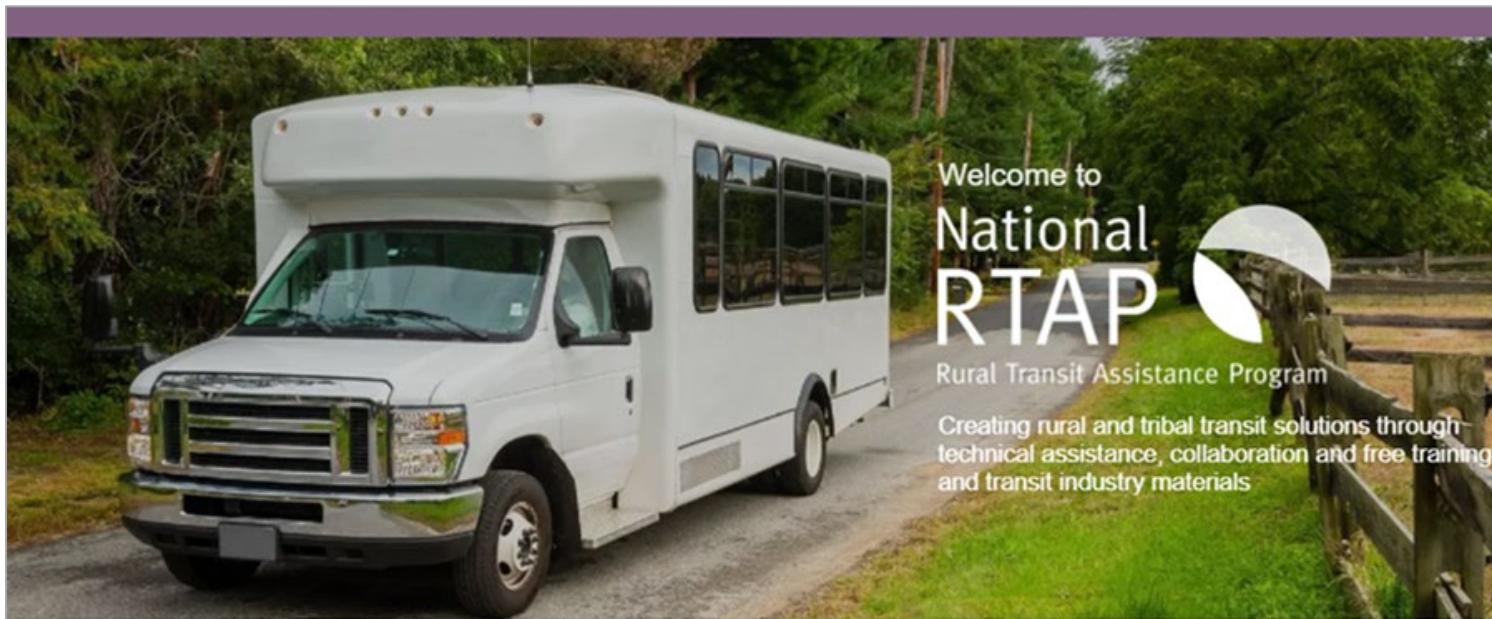
**Marriott Myrtle Beach Resort & Spa**

**[Nationalrtap.org/Conference2023](http://Nationalrtap.org/Conference2023)**



*Early bird registration deadline is October  
3rd View the draft agenda and register  
today!*





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**888-589-6821**



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Administration**

## Self-Advocacy Action Planning

<b>What will you advocate for?</b>		<b>Keep notes!</b>
What is the problem or situation that requires self-advocacy?		
Why does it need to be changed?		
Who will be affected by the outcome?		
Do you have a goal or goals in mind?		
<b>Identify a point of action.</b>		
What will be your first step?		
When?		
Where?		
With who? (List names of people you will contact)		
<b>Who is your support system, and how can they help?</b>		
Organizations, programs, agencies, etc.		
People		
<b>Gathering background information</b>		
Is there information out there that will help you advocate? (facts on the topic, data, local resources, etc.)		
<b>Your personal strengths</b>		
Skills		
Knowledge		
Experience		