



# Teachers' Guide

## Freedom Self-Advocacy Curriculum Third Workshop

**National Mental Health Consumers'  
Self-Help Clearinghouse**  
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In cooperation with:

**National Mental Health Association  
National Association of Protection and Advocacy Systems**

With grateful acknowledgement to the Community Support Program (CSP) of the federal  
Center for Mental Health Services.

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## Third Workshop – Skills

<b>Introduction to the third workshop</b>	<b>2</b>
<b>Preparing for the third workshop</b>	<b>2</b>
<b>Agenda for the third workshop</b>	<b>3</b>
<b>Teaching the third workshop</b>	<b>4</b>
<b>I. Preliminary Activities</b>	<b>4</b>
<b>II. Review of advocacy skills</b>	<b>6</b>
<b>III. Solving an advocacy problem</b>	<b>7</b>
<b>Wrapping up</b>	<b>8</b>
<b>Handouts</b>	<b>9</b>
<b>Evaluation</b>	<b>12</b>

## ***Introduction to the third workshop***

The third workshop focuses on developing some of the *skills* necessary for successful self-advocacy. The skills are broken down into two general categories, which are:

- § Written communication; and
- § Verbal communication.

In the first half of the workshop, you'll be presenting a general overview of these two skills. You will teach ways to communicate, either in person or in writing. Remind your students that they can review the *Self-Advocacy* Technical Assistance Guide if they need more assistance with these skills.

In the second half of the workshop, you'll return to the advocacy module you chose in the second workshop: insurance treatment denials, advance directives, or housing rights. Through this part of the module, your students will build on what they learned in the second workshop and they will practice using active skills they'll need when advocating for themselves.

## ***Preparing for the third workshop***

1. If you feel you need additional information about self-advocacy skills, consult some of the resources listed at the end of the Technical Assistance Guide, or contact the Clearinghouse for guidance.
2. Make enough photocopies of HANDOUTS J, K, L, and M for everyone in the class.
3. Review the *one* Advocacy Module that you will be using:
  - § Advocacy Module A (Insurance treatment denials);
  - § Advocacy Module B (Advance directives); or
  - § Advocacy Module C (Housing rights).
4. Note that depending on which Advocacy Module you have selected, you will be using that particular version of:
  - § The notes in this Teachers' Guide for section III of this workshop; and
  - § The Class Exercises for the Advocacy Module
5. Make enough photocopies of the chosen Class Exercises for the Advocacy Module for everyone in the class.

## ***Agenda for the third workshop***

Objectives: Students will learn to improve their:  
 - written communications skills; and  
 - oral communication skills.

Materials: HANDOUTS J, K, L, and M  
 Class Exercises for the Advocacy Module (A, B, or C)  
 Flipchart and markers, or blackboard and chalk

Time: 90 minutes.

Timeline:

	<u>Time</u>	<u>Method</u>	<u>Materials</u>
<b>I. Preliminary activities</b>	<b>(15 min. total)</b>		
A. Welcome back	5 min.		
B. Overview of today's topics	10 min.	lecture	
<b>II. Review of advocacy skills</b>	<b>(20 min. total)</b>		
A. Written communication	10 min.	lecture	HANDOUTS J, K
B. Verbal communication	10 min.	lecture	HANDOUTS J, L
<b>III. Solving an advocacy problem</b>	<b>(40 min. total)</b>		
A. A real-life scenario	10 min.	reading	Class Exercises for ADVOCACY MODULE (A, B, C)
B. Practice written communication	15 min.	written exer.	"
C. Practice verbal communication	15 min.	written exer.	"
<b>IV. Wrapping up</b>	<b>(15 min. total)</b>		
A. Evaluation	10 min.	written exer.	HANDOUT M
B. Wrap-up/further advice	5 min.	lecture	

## ***Teaching the third workshop***

### ***I. Preliminary Activities***

#### **I.A. Welcome Back**

(5 minutes)

1. Thank everyone for coming back.
2. Remind students of the issues of confidentiality. Remind them that what is said in the room does not leave the room.
3. Keep in mind that some of the issues discussed in your workshops may stir up negative feelings of fear, anger, or frustration in some of your students. Make sure everyone knows that, if they need a break, they're free to take one.

#### **I.B. Overview of today's topics**

(10 minutes.)

1. Explain that the focus of today's workshop is the *skills* necessary for self-advocacy.
2. Ask your students to look back (or think back) to the self-assessment tool that they filled in during the first workshop. Ask them to think about which skills they thought they were better at, and which needed more work.
3. Explain that you will be working on helping them improve their skills in these areas:
  - § Written communication; and
  - § Verbal communication.
4. Say that you'll briefly go through some pointers for these skills, and then you'll use a real-life scenario to help the students practice these skills.
5. Tell your students that you'll be using the same example as in the second workshop:
  - § Insurance treatment denials (A);
  - § Advance directives (B); or
  - § Housing rights (C).

## **II. Review of advocacy skills**

### **II.A. Written Communication**

(10 minutes. Materials: HANDOUTS J, K)

1. Distribute HANDOUT J (Overview of Self-Advocacy) and HANDOUT K (Sample letter).
2. Read aloud the points under “Step three: Communications” in HANDOUT J.
3. Read aloud the points under “Written communications” in HANDOUT J  
For each point in HANDOUT J, refer to how HANDOUT K illustrates the point:
  - § Follow standard format. Writer’s address, recipient’s address, and signature.
  - § Explain what you want. “Immediate payment of the hospital bill.”
  - § Include documentation. *Photocopy* of the hospital bill.
  - § Explain reasons action is needed. Promise to pay, followed referral procedure, facing collection agency.
  - § Explain steps you’ve taken. Spoken with company, left phone messages.
  - § Set timeline for response or action. Respond within five days.
  - § CC to the right people. To president of the company.
  - § Watch your tone. No insults, even though writer is upset.
  - § Keep a copy.
  - § Proofread.

### **II.B. Verbal communication**

(10 minutes. Materials: HANDOUT J, L.)

1. Distribute HANDOUT L (Sample self-advocacy statements).
2. Read aloud the points under “Verbal communications (phone and in-person)” in HANDOUT J.
3. Illustrate assertive responses by referring to HANDOUT L, part one (“assertive responses”).

Explain to your students that they should:

- § Focus on relevant facts.
- § Focus on remedies, not complaints.
- § Use “I” statements.
- § Address the other side’s argument.
- § Avoid the “run-around.”

4. Illustrate active listening by referring to HANDOUT L, part two (“active listening”).

Explain to your students that they should:

- § Ask for clarification if they don’t understand jargon or abbreviation.
- § Restate the other person’s position so that they’re sure they understand.
- § Ask for clarification if the other person’s reaction is vague.

### **III. Solving an advocacy problem**

**At this point, please note that there are three versions of Section III of this workshop, corresponding to the three Advocacy Modules.**

**You should use the same Advocacy Module that you chose in the second workshop, as described in *Introduction to the third workshop*. Follow the chosen version of Section III, and then skip ahead to Section IV of the workshop.**

Advocacy Module A  
Insurance Treatment  
Denials  
\$

Advocacy Module B  
Advance Directives  
4

Advocacy Module C  
Housing Rights  
—

## **IV. Wrapping up**

### **IV.A. Evaluation**

(10 minutes. Materials: HANDOUT M.)

1. Tell your students that they're almost done with the workshop, but you'd like them to evaluate the workshop so that you can work to make it better.
2. Distribute HANDOUT M and ask your students to complete the form.

### **IV.B. Wrapping up the workshops**

(5 minutes.)

1. Thank everyone for coming and encourage them to use the information and contacts they've learned about to accomplish their self-advocacy tasks.
2. If you or your organization is providing any sort of follow-up, such as advocacy groups, further workshops, etc., tell your students about these opportunities.
3. Encourage your students to contact the Clearinghouse, National Mental Health Association, National Association of Protection and Advocacy Systems, state P&A agency, and other state and national advocacy groups for support.
4. Encourage your students to reach out to their community and share their new knowledge of self-advocacy. Tell them to contact the Clearinghouse (800-553-4539) if they want to teach these workshops in their area.

**HANDOUT J**  
**An Overview of Self-Advocacy**

**Analyze the Problem**

**Formulate a Solution**

**Decide on an Action Plan**

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**Written Communication**

1. Follow standard format
2. Explain what you want
3. Include documentation
4. Explain reasons action is needed
5. Explain steps you've taken
6. Set timeline for response or action
7. CC to the right people
8. Watch your tone
9. Keep a copy
10. Proofread!

**Verbal Communication**

*On the phone and in person:*

1. Plan your agenda
2. Practice what you'll say
3. Be assertive
4. Don't attack or insult
5. Listen *actively* to the other person
6. Negotiation for what you want

*In person:*

1. Be on time!
2. Use positive body language
3. Watch your appearance
4. Maintain eye contact

**HANDOUT K**

**Sample Letter**

Steven Jones  
14 Broad Street  
Springfield, CT 04567

January 2, 200-

Mr. Evan Brown  
Claims Services Representative  
Acme Insurance Company  
2121 Lincoln Ave.  
Brookwood, CT 04848

Dear Mr. Brown:

I am writing to request the immediate payment of the enclosed hospital bill, for services provided on October 12. As you can see, the hospital is threatening to refer my account to a collection agency, and I am very upset that Acme Insurance has not paid this claim. I am considering referring this matter to the state insurance commissioner.

I had received a referral for the services in question. The referral number is BB 9854. Therefore, Acme should have paid this claim. When I spoke with you on the phone on November 20, you assured me that the bill would be paid within 10 days. After that time passed, I have been trying unsuccessfully to reach your department. I left messages on December 5, 10, 13, 15, and 19.

Please respond within five days of receipt of this letter. You can reach me by phone at (203) 555-2828. I am looking forward to the prompt resolution of this matter.

Sincerely,

Steven Jones

cc: April Jackson,  
President, Acme Insurance

Encl: Hospital bill (photocopy)

## HANDOUT L

### Sample self-advocacy statements

#### Part one: assertive responses

<b>Statement</b>	<b>Assertive Response</b>
<i>Insurance company customer service representative:</i> “I’m not the person who deals with this.”	“Tell me the name and number of that person. I called the number listed in my policy, and if you can’t help me, it’s your responsibility to tell me who can.”
<i>Social Security representative:</i> “I don’t have all of the information about your application, so I can’t answer that question.”	“When can I expect to hear back from you? I will call back if I don’t hear from you by then.”
<i>MCO executive assistant:</i> “I don’t think that there are any openings on the advisory board right now.”	“I was told that there are no consumers on the advisory board, and the law says that there must be consumer representation. Who is in charge of the selection?”
<i>MCO customer service representative:</i> “We can’t pay for the treatment because it is not medically necessary.”	“I would like you to send me an explanation of how you determine whether a treatment is medically necessary.”

#### Part two: active listening

<b>Statement</b>	<b>Active Listening</b>
“Normally, you would go to DDM for something like this.”	“What does DDM stand for? How do I get in touch with them?”
“We don’t usually get involved unless the community mental health care center has contacted us.”	“Does that mean that I should ask the community mental health care center to contact you?”
“I see.”	“Do you mean that you agree with me, or just that you understand what I’m saying?”
“Well, that about settles it.”	“So as I understand it, we agree that you will arrange for me to get new housing by next month, right?”

## HANDOUT M

### Self-Advocacy Workshop Evaluation

*Place an X in the appropriate boxes below.*

	Session One (Attitudes)	Session Two (Skills)	Session Three (Knowledge)
1. Which of the three workshop sessions did you attend?			
2. Which of the sessions did you enjoy the most?			
3. Which of the sessions did you enjoy the least?			

*Using the scale below, please indicate how you feel about the following statements.*

	Strongly Agree	Agree	Disagree	Strongly Disagree
4. I liked that the course was organized into attitudes, knowledge, and skills.				
5. I have a more positive attitude about being able to advocate for myself.				
6. I have developed some skills that will help me advocate for myself.				
7. I learned some information that will help me advocate for myself.				
8. I could relate to the people in the role-playing situations we worked through.				
9. I was interested in the specific issues that the workshop covered.				
10. I feel that the written materials that I received will help me advocate for myself.				
11. I am more likely to advocate for myself now that I have taken these workshops.				