An Updated Sketch of the Rationales for the Existence and Independence of the Citizen Advocacy Office

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Background: The Five Cornerstones of Citizen Advocacy

From the earliest days of Citizen Advocacy, presentations on it often explained that it had five cornerstones:

(a) the advocacy concept itself, which was based (as we explained then) on a one-to-one relationship with one individual in need, by a person who has minimal built-in conflict of interest, and therefore is an unremunerated volunteer, who is prepared to carry on a sustained relationship (though it was not ruled out that there might also be shorter crisis advocacies, or advocacies of a "near one-to-one nature");

(b) the instrumental-expressive relationship distinction;

(c) the differentiation of advocacy into various role types;

(d) the importance of facilitative legal provisions; and

(e) the "implementive-administrative mechanism," i.e., the Citizen Advocacy office that was independent in the sense of not having conflicts of interests, primarily of an administrative or fiscal nature.

These cornerstones were explained in two 1994 articles in the Citizen Advocacy Forum (Hildebrand, 1994; Wolfensberger, 1994).

In what follows, familiarity with the five cornerstones will be taken for granted, but in this article, we will selectively elaborate on the fifth one, and present certain thoughts—especially newer ones—that are more systematic than the treatments currently available in the written literature.

Four Historical Arguments as to Why the Citizen Advocacy Concept Would Not Work

Even if the first four cornerstones were in place, someone could say that the scheme was deficient, and would not work for the following four reasons, three of which (Nos. 1, 2, and 4) were in fact cited by the early critics of the Citizen Advocacy scheme.

1. Volunteers will not last. They are fickle, mobile, they come and go, and cannot be relied upon.

2. People who might be willing to become engaged with a needy person will not know how to get going on a relationship, or what a protégé might need. After all, in their natural lives, most potential helpers are not apt to run across a needy person with whom they would be well matched. Sometimes, this argument was followed with the reasoning that this is why people should volunteer to or through an established service agency or volunteer bureau.

3. Even if people ran across a needy person, and in theory would be well matched with that person, it is not very likely that they would enter into an ongoing advocacy relationship because no one would be giving an impetus or legitimization to it.

4. It was often said that a lot of people would refrain from agreeing to enter an advocacy engagement because they would be afraid that they would somehow get in over their heads. For instance, they might get into a situation where they would not know what to do, or where legal issues arose, and where they might even be held liable.

The third argument is certainly true, and the others have kernels of truth. These arguments have been commonly used to try to exclude free-agent servers or advocates from a scene, to delegitimize them, or to co-opt, capture and control them.

The Conceptualization of the Citizen Advocacy Office as a Response to the Historical Objections

The Citizen Advocacy scheme provided a positive response to the four challenges above by adding the fifth cornerstone that would operationalize Citizen Advocacy, converting an idea into practicality, and that was the Citizen Advocacy office. This fifth cornerstone was the last major conceptual element that became clear to Wolfensberger in the evolution of the Citizen Advocacy scheme. During the early conceptualization of the scheme, he spoke of "personal advocacy," and only in about 1968 of "Citizen Advocacy." He still uses the term "personal advocate" for people who function independently according to the first cornerstone, but outside the context of a Citizen Advocacy office. If memory serves, it was in early 1969, during the explorations of setting up the first Citizen Advocacy program in Lincoln, Nebraska, that the idea of a Citizen Advocacy office crystallized. This office would consist of full-time paid staff, not volunteers; but this staff would not be the advocates, they would merely serve in a facilitating role to unpaid volunteer advocates, and to the implementation process.

The Importance of Distinguishing Between the Functions and the Activities of a Citizen Advocacy Office

Before we discuss what we believe to be the four core functions of a Citizen Advocacy office, we want to briefly note that functions and activities sometimes get

confused with each other. A function serves a purpose. The attainment of that purpose is a goal. While all functions require activities to carry out the function, any one particular function might be served by many—maybe a vast number—of specific activities. Vice versa, any specific activity may well serve multiple functions. Altogether, any specific activity may serve a particular function without being that function, and the performance of an activity in service to a goal can then be viewed as a lower-order, or intermediate, step in the attainment of that goal.

For example, one of the functions of a parent is child-rearing. There are many activities a parent might engage in which serve that function, such as enrolling the child in school and supervising the child's education, taking care of the child's health (with home nursing of cuts, scratches, aches and pains, with periodic doctors' visits and immunizations, etc.), feeding the child, etc., etc. Any number of these activities contribute to child-rearing, but none of them by themselves are or constitute child-rearing. Another example: some of the goals of marriage can be said to be a complementation of identities, enriching of the two spouses, binding them in love, and assuring adaptive and moral propagation of progeny. But there are many functions performed by husband and wife to these ends, and each function might be carried out by zillions of specific activities. Similar things could be said about the functions proper to being, and acting like, an engineer, a hobbyist, etc.

While any specific activity may actually contribute to multiple functions, the more an activity does serve multiple functions, the more efficient the activity can usually be said to be.

The functions of the Citizen Advocacy office to be discussed here are those that have to do with the specific local offices operationalizing advocates, not with perpetuating and safeguarding the office, or Citizen Advocacy in general. We have conceptualized four such advocate-operationalizing functions, and call them "core functions" of local Citizen Advocacy offices.

The Four Core Functions of the Citizen Advocacy Office Staff

Primarily, and most fundamentally, the Citizen Advocacy office was conceptualized as an essential element of the Citizen Advocacy scheme in order to accomplish certain important functions which we now would put into the following categories. (a) Identifying potential advocates and protégés. (b) Establishing

"suitable" one-to-one matches between these potential advocates and protégés, and especially matches that otherwise would not likely have come about. (c) Maximizing the likelihood that established matches that should endure will endure, and that those that should not endure will not endure. (d) "Potentiating" the advocates who are deemed to be in suitable relationships, i.e., doing things that enhance the likelihood that the advocate will act on behalf of the protégé with relevant vigor, competency and impact. We will now elaborate on these four functions.

Identifying Potential Advocates and Protégés

The first Citizen Advocacy office function is to identify potential advocates and protégés. Finding people in need has never been difficult, because they are everywhere. But finding persons in appreciable numbers to serve as citizen advocates has never been easy. The functionaries in the Citizen Advocacy office have to find promising people, and then ask them to serve, and not get discouraged if most of them say "no," because every once in a while, one will say "yes." Actually, there are many people who are ready to serve, but who will serve only if they are challenged, and more specifically, by a challenge that speaks to them personally, in a way that other challenges would not. (Relevant to this point is the review of assumptions that underlie Citizen Advocacy (Wolfensberger, 1995), published in early 1995 in the Citizen Advocacy Forum.) So the Citizen Advocacy office functions as a challenger. One reason it was thought important to have employed and paid Citizen Advocacy office workers do this identifying and asking of people was that unpaid people are simply not likely to get around to doing enough of this.

The Demands Implied by the Criteria for Advocate Selection Established in 1969

Relatively early—Wolfensberger believes still in 1969, and even before the first Citizen Advocacy office was launched—Helen Zauha and Wolfensberger developed six criteria that seemed to have various degrees of relevance in recruiting and screening a volunteer, and in matching this person as an advocate with a specific protégé (Wolfensberger & Zauha, 1973, p. 24). A seventh criterion was added soon after that. These criteria have held up very well.

1. Commitment to the advocacy concept, i.e., partisanship on behalf of the protégé.

2. Willingness to undergo orientation and preparation. However, this was never meant to be so extensive as

1. The needs of such persons may be vast—even overwhelming to many people who would be otherwise suitable advocates for less needy protégés.

2. Some people who are in desperate need are often not easily likeable. In fact, some can be quite unpleasant, or otherwise difficult to like. Here we have to keep in mind that at least initially, many recruitable citizens will only say "yes" to certain potential protégés, and not others. For instance, many are more apt to say "yes" if the protégé is someone they can identify with (as elaborated in Wolfensberger, 1983).

3. Even where neither of these two conditions exist, the needy person's life circumstances may be such as to make ongoing access and involvement by both a personal advocate and Citizen Advocacy office staff very difficult. A very good example is someone in prison, and especially people in long-term higher-security prisons. Access to prisoners is made so difficult by so many factors that only the most persistent advocates would—so to speak—get through, and/or endure. Another example is people who are under intense persecution. What usually happens there is that if one becomes an advocate for such people, one will draw some—or all—of the same kind of persecution to which they are subjected. This then becomes one of the "costs" of advocacy, as we call it—in this case, the cost to the personal advocates.

It should now be clear that if one seeks advocates for the pool of people in need, much would argue for starting with some of the most needy and trying to find appropriate advocates for them. In contrast, if one started with advocates and tried to find appropriate protégés, one would almost certainly end up with many protégés of lesser need, because most such recruitable novice advocates would not want to take on the most needy persons. However, the Citizen Advocacy scheme itself does NOT stipulate one strategy as preferable over the other, though a number of Citizen Advocacy offices have made advocate-seeking for specific potential protégés their own specific or major mission or priority. In Wolfensberger's opinion, the advantages and disadvantages, or at least the full implications, of one approach in contrast to the other have not yet been systematically spelled out, though there is now probably enough experience in Citizen Advocacy to be able to do so. Hopefully, someone will take this on as a special project. Here, we will mention only a few, though most of the points to be considered deal with the potential "costs" of advocate-seeking.

1. Seeking protégés for advocates will almost certainly be easier than the other way around.

2. Seeking advocates for protégés will almost certainly be harder, but has been shown to have the potential for establishing some extremely potent advocacies for extremely needy protégés—often even ones whose very lives are at high risk.

3. Advocate-seeking for a potential protégé makes planning much more difficult. The reason is this. One can be rather confident that with a given amount of money and time, one can recruit X number of advocates for whom one can find suitable protégés. However, if one starts with X number of people with very severe needs or problems, one simply will not know for how many of them, or for which specific ones, one will succeed in recruiting advocates.

4. Earlier, we mentioned that advocate-seeking strategies often may try to find advocates for very needy persons who have come to the attention of the advocacy office. If that is the case, then offices that employ advocate-seeking as their major strategy may end up with a much less diversified array of relationships than offices with more flexible strategies.

5. However, protégé-seeking as the major strategy can also imbalance the relationship array of an office in the direction of low-intensity, informal, and disproportionately expressive relationships, as discussed by Wolfensberger (1983).

6. Recruiting advocates for the most needy people would fail to recruit those citizens who can be challenged successfully to enter less demanding but still quite suitable and needed Citizen Advocacy engagements. Such a failure would leave those potential protégés without an advocate who have less severe needs than the most needy people. We can see here one of the universal conflicts of interest, namely, that of needy people with each other.

7. Scenarios Nos. 3, 4, 5 and 6 carry a high risk of image—and even survival—problems for a Citizen Advocacy office. These scenarios may fail to demonstrate to the public that the Citizen Advocacy scheme can address a wide range of problems and needs with a wide range of advocacy roles and functions. Such a demonstration is important for gaining public support for the Citizen Advocacy scheme and movement, but often also for specific Citizen Advocacy offices where one finds any of scenarios Nos. 3-6. Without such a demonstration, a

local office may lose local support, and eventually its funding. Especially with an exclusive (or near-exclusive) advocate-seeking strategy, (a) advocate recruitment is likely to be very slow, (b) the total number of relationships is likely to be low even after a few years, and thus (c), to the ignorant, and on paper, such an office will look unjustifiably expensive and cost-inefficient, which can jeopardize the funding of that office.

On a historical note, Citizen Advocacy at first admittedly envisioned recruiting and matching protégés for the potential advocate pool, more than recruiting advocates for specific needy persons. Also, the early Citizen Advocacy offices had an understandable and rational motive for demonstrating success by establishing respectable numbers of matches, and therefore tended to recruit the more easily recruitable advocates. In turn, this meant that advocates were commonly matched with people who were not the most needy ones. Wolfensberger (1983) drew attention to this problem in a monograph, and apparently this was taken to heart by many Citizen Advocacy offices. With experience, and the confidence that came with it, and apparently evolving mostly in the Georgia network of Citizen Advocacy offices, a greater consciousness, emphasis, and expertise developed about advocate-seeking and matching for specific needy persons, and often starting with very needy ones, but the pendulum may have swung too far, and we will say more on this below.

8. Protégé-seeking usually means that an advocate has to be matched with a protégé rather soon after having volunteered, because otherwise, the advocate might not feel highly wanted, might get ensnared in other engagements, or might otherwise lose interest. One implication of this could be that matches are not as carefully made as when they get made in advocate-seeking, which usually requires a much longer period of searching and matching. This could also mean that advocate-seeking matches are more likely to endure than protégé-seeking ones, which would be an interesting question that could be researched.

Obviously, while there are some powerful benefits in advocate-seeking, the concomitant costs have so far not been sufficiently spelled out.

On the basis of the above considerations, we make two recommendations.

(a) Because seeking protégés for advocates is easier, we recommend that new Citizen Advocacy offices start with this as their major emphasis, and shift more to an advocate-seeking one after their board and staff have become more experienced, and have established a reasonable record of success. The reason is this: in launching a new enterprise, it is a general principle of sound decision theory and change agentry to go from the easier to the more difficult, and to risk failure only after having gained a sufficient baseline of successes.

(b) Well-established offices that have increasingly shifted to an advocate-seeking strategy should continue to also maintain a certain amount of protégé-seeking. Also, offices that had abandoned protégé-seeking earlier should resuscitate at least some of it. However, one needs to be vigilant to the fact that the greater ease of protégé-seeking could drive out the advocate-seeking strategy.

Establishing Suitable Matches Between Advocates and Protégés

Provided that a person who started out as a potential advocate is still deemed to be such, and has not been ruled out as an advocate for at least someone, then the second Citizen Advocacy office function is to establish what we have decided to call "suitable matches" between volunteers and needy persons. (In cases where one is recruiting an advocate for a specific protégé, or a protégé for a specific advocate, there might be overlap between activities serving the first and second office functions.) This function, important as it is, is very difficult to carry out without a Citizen Advocacy office and its paid staff presence.

Before speaking to other matching issues, we will elaborate what we mean by a "suitable match," and distinguish it from the process of "suitable matching."

The Concepts of "Suitable Matching" and "Suitable Match"

The forerunners of both the concepts of "suitable matching" and "suitable match" owe much to the disappointing history of advocacy and protection schemes prior to 1970. These concepts were therefore directed especially at the issue of fitting a measure to the need, and this in turn required individualization, i.e., taking into account many aspects specific to any one particular advocate-protégé match.

At the time one matches an advocate and a protégé to each other (regardless whether one started with advocate-seeking or protégé-seeking), one will not yet know whether the match will turn out to be suitable, as one hoped. All one can do is engage in the disciplines of

recruiting and matching that wisdom, judgment and previous practice in the Citizen Advocacy culture have pointed to as the most promising ones. Doing this can be said to constitute a suitable matching process.

Once a process of suitable matching has been carried out, only time will tell—though possibly quite soon— whether a match is actually a suitable one. In the meantime, one can speak of matches in their early stages as being promising or unpromising.

Of course, the determination that a potential advocate should not be matched to any protégé could also be made during the matching phase itself, not to mention that a Citizen Advocacy office may have to withdraw its approval of an advocate who has already been matched, and perhaps even been operational for years.

Our ideas about what constitutes such a "suitable match" may change once further discussion on this issue has taken place, but at present, we see the following six criteria as pertinent in deeming that a match has turned out to be a suitable one.

1. There is what one might call a relevant match between the identity and capabilities of an advocate, and the identity and needs of a protégé. Of course, the relevance of a match can change over time, as the two persons involved, and their needs and life situations, change.

2. There is a reasonably good match between the role of the protégé vis-à-vis the advocate, and the role(s) of the advocate in carrying out the advocacy function. This match is not likely to be good if there is a bad match under No. 1.

3. The advocate is willing to take active steps vis-à-vis third parties to address the protégé's problems and needs.

4. At least some protégé needs or issues that are important are addressed by the match.

   One of us (Peters) is currently thinking through the constructs of relevance and effectiveness of matching and matches, and it seems at least at this point that questions of how well advocate and protégé are matched in terms of identities, capabilities, needs, motivations and expectations has a bearing on the question of relevance.

5. The advocate senses, or believes, that there is something appropriate and fitting about the match and the advocate's role(s) in it.

6. The advocate is not harming the protégé.

It should be apparent that the construct of a suitable match only sketches the threshold of suitability. Even a match that falls far short of the ideal can still be suitable. It may even be suitable if the protégé does not feel happy with it, since Citizen Advocacy established from the beginning that some protégés may be unhappy (at least initially) about having any advocate, or about an advocate trying to do the right thing. There may be suitable matches that are better, more harmonious, more satisfying, more intense, more relevant to the pursuit of a given goal, more effective, etc.—but they are not more or not less suitable: ignoring the borderline cases, they either are or are not suitable.

Generally, a match will only turn out to be suitable if the matching process was suitable, i.e., if the Citizen Advocacy office engaged initially in a process of getting to know both the advocate and the protégé, understood protégé needs sufficiently, and conducted appropriate advocate orientation. However, one cannot categorically assert that all suitable matches are contingent on suitable matching. By sheer "dumb luck," an extremely unsuitable process of matching may nonetheless turn out to yield not only a suitable, but even an extremely successful, match.

In the Citizen Advocacy literature, we find a lot of material on the process of matching, and we also find a wealth of success stories, some narrated by Citizen Advocacy office staff, some by advocates, and to a lesser degree by protégés. What we find relatively little of is interpretations of the degree to which matches were distinguished in retrospect along a continuum from nonviable to viable to ideal. For instance, we are rarely given a vignette of an advocate turning in a performance that falls far short of the protégé's needs, but that is still so much better than nothing that the Citizen Advocacy office would never dream of replacing that advocate. In other words, the match is de facto deemed to fall into the suitable range, though it is suboptimal.

At the risk of being repetitious, we will spell out further what is, or is not, a suitable match.

A suitable match does not have to be a perfect match.

Although it should be obvious, it is nonetheless important to state from the outset that a suitable match is not intended to mean one which is expected to "live up" to an idealized state of perfection. For example, a suitable match is not interpreted here as one which requires the advocate to achieve the usually unrealistic and impossible goal of addressing all of the needs of the

protégé. Indeed, given the flaws and limitations of all human beings, no relationship (however strong) can be altogether free of difficulties, defaults, disappointments, or setbacks—characteristics which reflect the imperfection of our world and of those who inhabit it. A suitable match, therefore, should not be measured against utopian ideals.

A suitable match does not necessarily imply that even addressed protégé needs are being met.

There is a difference between appropriately address-ing a need and actually meeting that need. This distinc-tion requires emphasis since for some people, the "wounds" that they have suffered, and continue to suffer, have been inflicted with such intensity and/or frequency that even a potent and needed response may fail to heal, reverse, or lessen the negative effects of the wounds. For example, a protégé who has been deeply wounded by relentless rejection from others may not be able to develop a sense of security in relationships, or any measure of self-worth, despite the ongoing presence and demonstrable caring of a citizen advocate. Thus, appro-priate advocate address of important protégé needs (criterion No. 4 above), rather than invariably "success-ful" outcomes therefrom, should be a key indicator of a suitable match.

A suitable match does not imply that the match has realized its potential.

Related to the above points is that a suitable match does not suggest that the match has reached its Everest of potential. That is, a match may be suitable, yet still remain capable of achieving much more—perhaps over time, with advocate growth, and with appropriate support from the Citizen Advocacy office.

The advocate in a suitable match may very well be "underdeployed."

Once a match has taken and been deemed suitable, one may discover that one could probably have matched the advocate with a much needier protégé, and that in that sense, the advocate is underdeployed. Such advocate underdeployment may occur more often in protégé-seeking strategies than in advocate-seeking ones. At any rate, an established relationship should not be disrupted in order to match the advocate with a different, and more needy, protégé. Instead, one would try to engage the advocate as fully as possible with his/her protégé, and perhaps even in respect to the protégé's less urgent problems.

Several of the above points mean that a match can be

suitable even if some important protégé issues and needs are not being addressed by the advocate, as long as others are. After all, some protégés have such massive needs that hardly any citizen advocate could deal with all of them, or at least not all of them at once. It could also mean that an advocate needs more time. Even good advocates often deal with only one issue, or a few, and address others eventually after some successes, or after the relationship has evolved. However, one other implica-tion could be that a protégé needs more than one citizen advocate.

Imperfections of a suitable match are not necessarily the advocate's fault.

There will be a temptation to ascribe the suboptimality of an otherwise suitable match to the shortcomings of the advocate, when in fact it could be due to poor matching by the office, poor orientation, poor follow-along, or poor support of the advocate-potentiating kind, to be discussed later.

The construct of a suitable match is certainly not meant to legitimize mediocrity.

An optimal match made in heaven is a suitable match, as is a barely tolerable one. Thus, the concept of a suitable match is not meant to convey that a Citizen Advocacy office has done sufficiently well if all of its matches are suitable. After all, the way we defined suitable matches implies that these can fall along several continua of desiderata. One way to think about this is that even suitable matches can be far from optimal. (Peters is working on an as yet unpublished manuscript on this issue.) The office should try to improve any matches that are lacking in certain desiderata, usually by giving the advocate all sorts of support, as touched on later.

Relevant to several of the above points is the idea that one's visions of what is a theoretically ideal match for a particular needy person should not become a motive for delegitimizing a perfectly suitable but less-than-ideal match. That a match which falls short of the ideal can still be a very suitable one is concordant with our teaching that a committed advocate should not be expected to be infallible and avoid all mistakes (e.g., Peters, 1998). After all, even the best of parents make mistakes in their child-rearing, to say nothing of the mistakes made by the most unforgiving of lawyers.

Suitable matches are not all attributable to Citizen Advocacy office doings.

As mentioned, any one particular match can turn out to be suitable, or even excellent, for reasons not within the

Citizen Advocacy office ken, competency, or "doings." Nonetheless, the quality of the totality of the matches of a Citizen Advocacy office will reflect its ken, competency and "doings."

We want to be clear that we were not trying to hold forth on all the things that Citizen Advocacy offices should do that lend quality to recruitment, matching, orientation, etc., on which there already exists much literature and good teaching. All we wanted to do here was lay out some criteria for judging the suitability of an established match. And because misunderstandings could arise so easily, we keep reiterating that one reason for conceptualizing matches as suitable or unsuitable was to discourage Citizen Advocacy offices from delegitimizing a match that is not quite what the office had in mind, but that is nonetheless beneficial to the protégé. If an advocate is suitably matched but does not pursue the mission the office had in mind, or does not pursue it well, then the answer may be to recruit a second advocate (a co-advocate) who presumedly will, without delegitimizing the first advocate.

Why Paid Staff Presence is So Important for Establishing Promising Matches

Now that we have sketched a few important challenges of bringing about matches that turn out to be suitable, it is easier to understand why a Citizen Advocacy office and its paid staff are so necessary. In fact, the challenges of making good matches—i.e., of matching suitably—have been extensively addressed in the Citizen Advocacy literature (e.g., by Edson, 1995). There are only two reasons why this issue is getting as much address here as it is: (a) to sketch the concept of a "suitable match," and (b) in order to firmly establish why a Citizen Advocacy office with paid staff is needed.

Even where people would be quite willing to function in a personal advocate role in the sense mentioned earlier, it simply would never happen for many people without some agent playing some sort of facilitating process. In the fewer cases where it would happen anyway, it would probably happen later than it might have, and the relationships they do thusly enter are apt to be much less suitable and effective than they might have been, without a mediating process. For all this, we can cite at least four obvious reasons.

1. Many people would not have had occasion to meet a person relatively close up whom they would have recognized as having an unmet need.

2. Even if they had met such a person close-up, they might not have thought that they might be in a position to address the unmet need at issue.

3. Even if both conditions were met, it is still highly unlikely that some kind of understanding would come about that would have bonded the two people in a personal advocacy relationship, or that would legitimize the two people in their mutual roles, the one as an advocate protector, the other as an advocatee, or protégé.

4. Even if every potentially willing and suited person somehow got into a personal advocacy role, this would still leave a vast army of the most needy without a personal advocate, for the simple reason that the most needy ones are also the ones who would generally be the least likely people to be encountered in any natural way by the vast majority of the recruitable citizens. The vast majority of people simply do not naturally come into contact with segregated or isolated settings, such as prisons, institutions, nursing homes, or even hospitals, or with people who are in dire circumstances even if they are not in such settings. Even where people are apt to encounter the very needy, such as homeless people on the streets, the encounter is rarely conducive to the establishment of a positive relationship. In other words, the majority of citizens who would enter into personal advocacy roles on their own initiative would do so with people of much lesser need than the ones with whom they might enter an advocacy role via the mediation of something like a Citizen Advocacy office.

Another way of putting this is that there are a certain number of citizens who will "find" a needy person to relate to and/or advocate for, but there are a vast number of needy persons who will not be able to "find" an advocate, and some such needy persons are not even capable of looking for one.

In order to address all these problems, one needs competent people who are in a situation to craft promising matches of a significantly larger number than would occur spontaneously. And best suited for such a task are people who devote themselves to this task on a full-time or many-hours-a-week basis, which with few exceptions means paid people. Otherwise, not even the breadth of knowledge and sophistication for recruiting advocates and protégés, matching them, and supporting the matches, is likely to be maintained. One not only needs to be competent on issues of challenging potential advocates, but also on the other side of getting to know where, what, and who the people are who have high needs. Then comes

the third part, which consists of successfully figuring out which member of the potential advocate pool, and which member of the potential protégé pool, are to be brought together for a match that has the potential of being suitable and enduring.

The question might be raised whether volunteers could not do the recruitment and matching of advocates and protégés. In theory they could, but unless they invested as much time as paid staff can, and acquired as much sophistication as paid staff usually do, they would not establish many matches, or not as many successful ones. Furthermore, there are two more core functions of Citizen Advocacy offices yet to be discussed that are also almost impossible to carry out on a volunteer basis.

Maximizing the Likelihood That Suitable Matches Endure, and That Clearly Unsuitable Ones Do Not, Including Via Follow-up, Follow-Along, and Support

The third important (core) function that Citizen Advocacy offices are expected to perform is to try to make endure those advocate-protégé matches that really should endure, and to try to terminate those matches it has made that are nonfunctional, or even harmful to protégés. However, situations where established matches should be disestablished have proven to be much rarer in Citizen Advocacy history than many people early on assumed. Among the worst-case scenarios are when it turns out during the follow-up or follow-along phase that the advocate is more of a menace than a boon to the protégé, or where one advocate interferes detrimentally with the advocacy of a co-advocate, which is an extremely rare occurrence.

As to endurance of established relationships, it is easy to appreciate that there might be relationship attrition problems, and while we will highlight only three of them, even well-established and suitable matches can be at risk of these.

1. The most common and basic reason for advocate attrition is human imperfection, as much—or only somewhat less so—among challengeable citizens as among other humans. One can get caught up in life's routines, and/or become overwhelmed by the demands of life in a modernistic society, so that one falls behind in staying in contact with people. One can forget things one meant to do, and one may make mistakes in judging the protégé's situation.

2. There are also things that protégés may do that mislead the advocate and result in engagement breakdown. This could include misleading messages from a protégé to an advocate, failure of the protégé to contact the advocate when a problem arises, or a protégé giving the advocate discouraging messages.

3. Advocates may also labor under some misapprehensions, which could happen despite a correct orientation having been given to them during the matching phase. For instance, the long-term or even life-long vulnerability or dependency of a protégé may not have sunk in on the advocate. In fact, this is a serious danger all around in that even some Citizen Advocacy personnel are often sort of stupid on this issue. The risk of such misapprehensions on this issue has actually even increased over time because of modernistic notions of autonomy, "choice," self-determination, and self-advocacy, all of which incline people who hold these notions to assume that impaired and/or devalued people should function autonomously, that people can do so competently when that is not the case, that dependent people will become autonomous if given enough time, or that people should be autonomous even if they cannot be competently autonomous.

Furthermore, it is particularly after an advocate has taken care of a major problem—perhaps one that loomed large during the matching phase—that the advocate may assume that essentially all problems are solved.

Another very common misapprehension is that a relationship should terminate when one of its two members relocates. However, the suitable thing in many such situations is not termination, but a change in the nature of the relationship. For instance, the advocate may change his/her role by phasing out most or all instrumental functions, and instead enter a low-intensity role that is mostly, or perhaps even entirely, expressive, so that it is more properly called a friendship than an advocacy. Such a role can be carried out by phone calls, letters, gifts, and perhaps occasional visiting.

The way in which the Citizen Advocacy staff improves the likelihood that an established relationship that should endure will endure is through three kinds of activities that have been referred to as follow-up, follow-along, and support.

Follow-up consists of a series of contacts during the early post-matching phase. Above all, these contacts are with the advocate, but in many cases, also with the protégé, and perhaps even with other involved parties (such as the protégé's service providers). This follow-up is meant (a) to verify that a match that has been made is "taking," (b) to identify any factors that might reveal

themselves as obstacles to a match being suitable, and (c) to take whatever corrective actions appear to be indicated and feasible.

If everything goes well, then at the end of the follow-up phase, one has a match that has acquired momentum, and that is within the range of what makes a match at least suitable, and the Citizen Advocacy office then shifts to a (usually) lower gear of follow-along. This is a form of usually low-profile monitoring so that things will not inadvertently fall apart, or to see if there is a change in status of the protégé or the advocate that requires a change in the momentum or natural direction of the relationship, and that may need to be interpreted to the advocate.

Overall, follow-along can also be viewed as a protection of the Citizen Advocacy office's investment in the difficult and costly process of advocate recruitment and matching. Historically, there have been a proportion of Citizen Advocacy offices that went into a permanent, and relatively successful, advocate recruitment frenzy, but hardly paid attention to the fact that a huge percentage of their resultant matches were so shallowly planted that few endured. By keeping up their recruitment frenzy, such offices were apt to be able to report large numbers of active matches at any given time, but a close examination would reveal that few of these ever lasted, and that these offices were thus really brokers for many short-term relationships. One might call this "advocate churn-ing"—the equivalent of account churning by stockbrokers. Funders might have been too naive to perceive this, but many such offices did not last anyway, often because a deeper understanding of Citizen Advocacy, or a maturity of judgment, were lacking, and the advocate churning was merely one of the symptoms thereof. By the way, this is one of many reasons why a Citizen Advocacy office needs to be subjected to reasonably frequent external expert evaluation, so as to spot problems before they destroy a Citizen Advocacy office.

Often, it is only via follow-along that it becomes apparent that a relationship needs a certain kind of support, especially in those cases where it is not explicitly and spontaneously requested by either an advocate or protégé. Much like advocacies can be primarily instrumental, expressive, or very mixed, so can the support given by the Citizen Advocacy office, and since most forms of support have something to do with keeping or making advocacy effective, we will address it under the next heading.

Potentiating Advocacy Engagements

The fourth major core function served by a Citizen Advocacy office is one that seems best described by the term "advocate potentiation" or "advocacy potentiation." This refers to actions that put activism, strength, and power ("potency") into an advocate's role, or that add more of them if it already has some of these. We believe that the term "advocacy potentiation" is a very useful and evocative one that should begin to be used more.

Advocate potentiation must be understood as a process, not an outcome measure. In other words, even a highly potentiated advocacy may fail to achieve an advocacy goal. However, potentiated advocacies are vastly more likely to be effective, i.e., to yield desirable outcomes for protégés.

Just above, we spoke of the support activities of Citizen Advocacy offices, and we can now clarify that these serve two distinct purposes, namely, that of making a relationship endure, and that of advocate potentiation.

The expressive side of the support polarity might actually be called moral support. It involves all those things one does to bolster the strength, conviction, and commitment of advocates for both enduring in their role, and doing the right thing in it, which latter falls under the potentiation construct. These activities might subsume things that might be called pep talks, reassurance, messages of affirmation, and emotional support.

The instrumental side of support can potentially take a vast array of forms: giving advocates all sorts of practical advice, helping them in writing letters and petitions, helping them to deal with officials and services, accompanying them to hearings, clarifying the advocate's legitimate standing to other parties, help getting legal advice if needed, etc. Apparently, all of this constitutes potentiation.

Of course, the instrumental support role played by the Citizen Advocacy office is very different from any instrumental functions performed by the advocate. The instrumental support activities of the Citizen Advocacy office are strictly played out to potentiate the advocates, and should not drift into becoming a direct instrumental support to protégés. It is the advocates who need to translate the instrumental support received from the Citizen Advocacy office into either an instrumental or expressive benefit to their protégés. A key Citizen Advocacy idea overall is that it is the free-agent voluntary server—the advocate—who does the real and most valuable work, and that paid workers do as much facilitat-

ing on their behalf as possible, so that it is the volunteer who is the advocate, and the Citizen Advocacy staff are the advocate-enablers and advocate potentiators.

Thus, both instrumental and expressive supports from a Citizen Advocacy office can make contributions to both advocate endurance and potentiation. Sometimes, moral support can be absolutely decisive to both the endurance of an advocacy relationship, as well as its long-term impact, and thus its potentiation. There is hardly a human being who would not falter in the face of many difficult or ambiguous situations if it were not for timely moral support from another party.

We suspect that the potentiation function could be further analyzed and broken down, and again we hope that someone would do this. For instance, there are various activities that could be put under the rubric of "fine-tuning" a relationship. Such fine-tuning could take place either during the follow-up or follow-along phase, and would be concerned with the advocate and the Citizen Advocacy staff trying to learn more about the protégé's needs, and what actions relevant to these needs can be called forth from the advocate now, which may require support. Particularly with years of experience, we can now say that one challenge here is to find out how advocates of certain protégés can be encouraged to take on actions on behalf of their protégés that are ever more difficult—either in actuality, or at least more difficult in the mind of the advocate. These actions may require more daring, more confidence, perhaps more courage, greater commitment, new skills, or possibly only more time. Bringing all this about is obviously and quintessentially a form of advocate potentiation.

Now to come back to the connection between follow-along and support: while follow-along is, as mentioned, a major way of insuring the endurance of a Citizen Advocacy relationship, and of protecting the recruitment investment of a Citizen Advocacy office, it also contributes to advocate potentiation in the sense that without follow-along, potentiating support is vastly less likely to take place. The reason is that without follow-along, the office would rarely become aware of an advocate's need for support, and even if the advocate does not drop out, the advocate is likely to function in an underpotentiated fashion. Thus, follow-along can be viewed as the subsoil on, and from which, support can grow. It is very important for Citizen Advocacy staff to understand this, and not neglect follow-along in favor of additional recruitment.

Again, we are not meaning to discourse on how to

support relationships well, but only want to bring out that once a relationship exists, the support activities will be the medium through which a Citizen Advocacy office can potentiate an advocate.

In Wolfensberger's earlier presentations on Citizen Advocacy, he sometimes explained the supportive role of the Citizen Advocacy office by an analogy to the parable of the Good Samaritan (Luke 10:30-37), with the Good Samaritan being the citizen advocate and the Citizen Advocacy office being made up of people who could help him find answers to questions such as how to bind up the wounds of the man who fell among the robbers, to which inn he might take the victim, how to make sure that a physician will look in on the victim, which physician to recruit, how to make sure that the innkeeper did not cheat on the money that the Samaritan paid him up front, how to locate the kinfolk of the victim, reporting the robbery to the authorities, and who else should be notified of the incident. Also, the Citizen Advocacy office could alert the public to the fact that many Good Samaritans were needed, and particularly so on the road from Jerusalem to Jericho because it was so unsafe. The Citizen Advocacy office might also suggest to the Samaritan that the superiors of the priest and the levite who passed by the victim without rendering aid should be told about this, so that proper disciplinary action would be taken, and young people in training for the priest and levite roles could be better ideologized. Throughout all of this, the Citizen Advocacy office would whisper into the Samaritan's ear to be steadfast, to maintain his devotion to charity and the victim, to give a clear charge to the innkeeper, and to be firm in addressing the superiors of the priest and the levite. Again, we can see how this kind of support, growing out of follow-along, would contribute both to the endurance of the relationship between the Samaritan and his protégé, and to the Samaritan's advocate potentiation.

Once again, it should be clear how unlikely it is that follow-up, follow-along, and support would be available as needed if these activities were to be conducted by unpaid volunteers—"on the side," so to speak. There have been discussions—and an entire multi-day brainstorming session—on whether one could and should attempt to operate a Citizen Advocacy office without paid staff. The only way this could be done would be if there were people willing to carry out the office tasks (including providing around-the-clock access to advocates) as an unpaid job, which would be "the least unlikely" within what has been called a "communal model" of Citizen Advocacy. In all likelihood, this would only be possible (a) where a previously funded office had been operative.

and the board of directors continued its commitment, (b) almost certainly only for a relatively short time span, and (c) for only a very small number of matches. The very remote possibility that some group somewhere in the world just might be able to keep a bit of a Citizen Advocacy office going in this way after its funding is lost must not be taken as a legitimization for starting a Citizen Advocacy office before one has funding, or for assuming that one can afford to lose one's funding and still carry on. This is not the place to elaborate on this issue, and this article has only dealt with the "standard model" of Citizen Advocacy that is contingent on a paid staff.

Conclusion to The Four Core Functions of the Citizen Advocacy Office

We can now say several things that deal with several of the core office functions, or how they fit into the overall Citizen Advocacy scheme.

One distinction to keep in mind is that between the functions of Citizen Advocacy as an overall scheme, and the functions of Citizen Advocacy offices. These are not identical. The function of the Citizen Advocacy scheme overall is to protect and promote the interests and welfare of specific needy people via the individual advocacy of relevantly competent other persons who engage themselves without significant conflicts of interest. The overall function of the Citizen Advocacy office and staff is to see that this happens in specific locales, and the four core office functions discussed above will do this—provided, of course, that the local office exists and stays in existence, and adheres otherwise to Citizen Advocacy principles. These issues fall under the topic of safeguarding, and are covered in other works.

As mentioned before, one thing this analysis teaches us is that we must distinguish between things that Citizen Advocacy offices do and should do—i.e., their activities—and the functions these activities serve. Earlier, we said that Citizen Advocacy office activities can serve multiple functions simultaneously. For instance, there are activities that can serve simultaneously the functions of identifying potential advocates or protégés, and of matching them. Other activities may serve not only the function of making matches more enduring, but also of potentiating them. Advocate orientation is often called one of the "key activities" of Citizen Advocacy (e.g., in CAPE, O'Brien & Wolfensberger, 1979; also Lutfiyya, 1993, and Peters, 1997). However, this activity serves up to three of the four core office functions, and above all the establishment and maintenance of suitable matches. Relatedly, we are no longer so sure that the word "activ-

ity" is appropriate the way it was used in the 1979 edition of CAPE, but have to think some more about this, and would appreciate other people's thinking on it.

We have said little in this context about the advocate orientation activities of the Citizen Advocacy office, because so much has been said about it elsewhere. We only want to mention two points. (a) Advocate orientation is one of those things that would be difficult to do without paid Citizen Advocacy staff. This is yet another rationale for having such staff. (b) Advocate orientation contributes to the function of creating suitable matches, and secondly to the function of maximizing the likelihood that matches will be of the desired endurance. To a lesser extent, the orientation may even already begin to make a contribution to the function of advocate potentiation.

The four core office functions we have sketched were not meant to exhaust all of the functions that a Citizen Advocacy office could or should carry out. For instance, such offices most certainly should also carry out certain safeguarding functions, but we have to understand that foremost, these are really in support of the very existence of Citizen Advocacy offices, and in support of the four core office functions. For instance, from the beginning, the Citizen Advocacy office was charged with the process of disseminating awareness of the need for Citizen Advocacy, and to elicit not only people's commitment to serve as advocates, but also community support for the schema, and for the idea of advocacy generally. Success in such endeavors would make the Citizen Advocacy scheme better known, and would generally elicit more support for it. In turn, this can be expected to facilitate advocate recruitment, and contribute in multiple ways to what we have called office viability over the long run, including by making funding more likely to happen.

From the beginning, Wolfensberger also expected the local (and any state-level) Citizen Advocacy offices to become a source of insight into, and refinement of, the Citizen Advocacy scheme and its procedures, and that has, in fact, been the case all along as more and more offices became established, as some of them accumulated long-term experience, and as changes on the larger social scene have posed new challenges.

The history of Citizen Advocacy has also revealed that people can fall into the error of confusing a benefit of Citizen Advocacy with one or more of its purposes or functions. A good example of this is community-building. This is not the rationale and purpose of Citizen Advocacy, but is one of its almost normative benefits. Thus, Citizen

Advocacy de facto serves to build community, but this is neither its essential purpose, nor one of its core office functions, and none of the essential purposes of Citizen Advocacy should ever be sacrificed for it, as they sometimes have been.

The Independence of the Citizen Advocacy Office as a Parallel to the Independence of the Advocate, and as a Precondition to the Core Office Function of Advocate Potentiation

The requirement that an advocacy be as free as possible from conflicts of interest has implications not only to a citizen advocate, but also to Citizen Advocacy offices. In this section, we will discuss some of these issues primarily as they bear on the core office function of advocate potentiation. Some of the points touched on here will also be found addressed in chapter 11 on "Funding, Governance and Safeguards of Citizen Advocacy Services" in Wolfensberger and Zauha (1973).

The Crucial Importance of the Issue of Conflict of Interest

In order for an activity or helping form to be acknowledged as advocacy, it is one of the most essential requirements that there should be minimal conflict of interest between the advocate party and the advocatee party. Of course, the issue of minimizing conflict of interest has been understood from day one to be at the heart of Citizen Advocacy, and is generally taken for granted in what follows. However, of special relevance to this article is that to the degree a Citizen Advocacy office has conflicts of interest, to that degree it can be expected to refrain from doing things that would result in potentiated advocacy.

As an aid to our further analysis, we briefly point out that all advocacies, including Citizen Advocacy, can be analyzed and situated in respect to five dimensions which will clearly separate advocacy forms from each other, and highlight their respective functions, potentials and limitations.

The first dimension is for whom an advocacy is conducted. There may be advocacies for individuals (as in Citizen Advocacy), for collectivities, and even for entire classes, such as for children, for persons who are retarded or in prison, and so on.

The second dimension of advocacy is for what, i.e., the goal of an advocacy. Some advocacies or advocates try to obtain justice or legal rights, some might work for school integration, for physical accessibility into public

places, for a better residential situation, etc.

Third, advocacies are also directed toward—or sometimes even against—different parties, structures, or persons, as when the advocacy is exerted toward, or against, a particular human service agency, a physician, a school board, etc.

Fourth, advocacy can be conducted by different parties (by whom). For instance, the advocacy might be conducted by an unpaid individual (as in Citizen Advocacy); or by citizen collectivities, such as voluntary associations; or by paid agency workers, such as in protection and advocacy offices; or by free-lance paid professionals such as lawyers, to name a few common potential advocate parties.

Finally, advocacies use different strategies and tactics (how done). One might use persuasion, education, confrontation, legislative and other lobbying, litigation, etc., again to name only a few common strategies.

The relevance of this analytic tool to our discussion is that the "by whom" party needs to be free from conflicts of interest vis-à-vis the "for whom" party and the "toward or against what or whom" entity, and to a lesser extent vis-à-vis the "for what" and the "how done" issues.

As we pointed out before, in Citizen Advocacy, the idea is to reduce conflicts of interest of the advocate party by recruiting (a) free-agent citizens, (b) who serve without pay or equivalent recompense, and do so (c) on a one-to-one or near-one-to-one basis so that their loyalty and attention are not divided. These individual unpaid personal advocates (the "by whom") may be busy people with jobs and a full life who may be up against powerful parties (the "against whom"), possibly even including government and vested interests, and quite commonly against people who, as full-time paid employees, have much time to oppose them. This is one of several reasons why it is important that personal advocates have a resourceful potentiating ally in the Citizen Advocacy office, and that this office also be as free from conflicts of interest as it is possible to make it, lest it lack or lose its effectiveness as an ally and potentiator of its citizen advocates.

Two rationales related to the issue of conflict of interest that are crucial to our topic (but also to any form of real advocacy) are the following.

1. One can not expect a party to advocate against itself, and especially not so over the long run. There are simply too many pulls and pushes for self-maximization. Even if one could resist temptations here and

there, it would be impossible for humans to resist all of them all of the time, or even to recognize temptations as such.

Yet further, difficult as it is for individual humans to advocate against themselves, it is even more difficult for collectivities, organizations, or agencies to do so. It is known as a fact that in time, systemic dynamics take over from personal ones; and especially across the long run, these always assert themselves in favor of the system, at the cost of and to the individual.

2. For the very same reasons, if one can help it, one does not set a party that is being advocated against into control over the party that is doing the advocating (the "by whom"). Control over an advocate party by a party whose interests are at odds with those of the advocatee party is extremely apt to be used (especially after an initial tolerance phase) to influence the advocate party's perceptions, to intimidate it, to "deadvocate" it, or even to terminate the advocacy or the advocate. The historical evidence on this issue is so overwhelming that only the most goody-goody an empirical mentality could argue against its reality, and against its relevance to advocacy. The controls over an advocate party that are the most common and most familiar ones to us are administrative and fiscal ones, i.e., where the advocate party would be run, or funded, by the party against which it is supposed to advocate. However, there often are also other controls, such as ideological ones, or even relationship ones, as in the case of the informal controls that relatives, friends and lovers have over each other.

When advocates confront powerful parties in the community, and it becomes apparent to these powerful parties that the grief they are experiencing on account of the advocacy action comes from advocates who have been activated and potentiated by a Citizen Advocacy office, then at that point, the aggrieved parties will be unhappy not only with the advocates but also with those who are seen as being responsible for having "egged on" these advocates and "sicced" the advocates on them. The aggrieved parties are then apt to want to squash not only the advocates, but also the source of their advocacy, which—so to speak—resides in, or is, the Citizen Advocacy office. They may try to get the Citizen Advocacy office to "call off" the advocates; if they have a way of exerting influence on the governing body of Citizen Advocacy, they may try that; if that were to prove impossible or futile, then they would be tempted to put the office out of business if they could, as by undermining its sources of funds, and trying to get funders to quit funding

Citizen Advocacy.

So it was clear from the start of Citizen Advocacy that those who would recruit, match, and support the individual personal advocacy relationships also had to have minimal conflict of interest.

As regards the advocates, they have the advantage that two major sources of conflict of interest are removed, in that they are unpaid free agents. Namely, this would remove conflicts attached to either funds, or to employer mandates. But as regards the Citizen Advocacy office, its sources of funds, and its governance, are two major potential sources of conflict of interest, and if such conflicts exist, they can be expected to express themselves—later if not sooner—in the following nine (and possibly more) areas and ways.

1. The board—and in the case of a corporation that conducts activities other than Citizen Advocacy as well, the committee that should exist to oversee the Citizen Advocacy operation—may not only have members who have personal conflicts of interest regarding Citizen Advocacy, but may have too many such members who have too many or too big conflicts of this kind. (By the way, Citizen Advocacy oversight committees of such a corporation can be thought of as "sub-boards.")

2. In turn, this is apt to express itself in the functioning of the board and/or the respective Citizen Advocacy committee, and create conflicts about Citizen Advocacy above and beyond those conflicts or problems that would be present even where governing or oversight members do not have personal conflicts of interest about Citizen Advocacy.

3. One of the areas in which the conflicts of interest could express themselves is in the selection or retention of Citizen Advocacy staff. For instance, staff might be selected who are more passive, afraid of conflict, or who themselves have loyalties not fully compatible with Citizen Advocacy conduct.

4. Yet further down, citizen advocates may be recruited who are less likely to be forward in their advocacy, and/or the advocates may not be oriented to, and guided or supported in, their advocacy function the way they ought to be.

5. Protégés may be selected by the Citizen Advocacy staff who do not have high needs, and whose identity does not imply strong advocacy demands on their behalf by their advocates.

6. Even if a Citizen Advocacy office is free-standing with its own board, and free to recruit protégés as it sees fit, its board members or staff might have personal allegiances that eventually will affect the protégé selection process. For example, the clients of certain services may be given preference—or may be discriminated against.

7. People in the Citizen Advocacy culture have also spoken of the possibility that the decision-makers in a Citizen Advocacy office could have a "service mindset" (especially if they had been trained or employed as service providers) that could not only influence the protégé and/or advocate selection strategy of an office, but could even be of a conflict of interest nature, as when it dampens advocate potentiation fervor.

   Scenarios Nos. 6 and 7 could play themselves out without getting explicated, and even without consciousness.

8. One or several of the above things are apt to express themselves in an imbalance in the kinds of advocacy relationships that get recruited. Informal, expressive and low-need ones may be established in preference to instrumental, high-need or formal relationships. Problems with this kind of imbalance were addressed in a monograph (Wolfensberger, 1983) mentioned before.

9. The Citizen Advocacy office may give the kind of guidance to advocates that steers them away from confrontations and conflicts that are actually appropriate, or even needed.

Implications to the Governance and Funding of Citizen Advocacy Offices

Considering that the most common conflicts of interest for a Citizen Advocacy office derive from its administration and funding, some very clear principles were set forth from the start of Citizen Advocacy, and have been refined since.

Implications to Governance

As regards the governance of a Citizen Advocacy office, such an office should not be part of an agency that also performs any functions that are inherently antagonistic to Citizen Advocacy. Most antagonistic of all is the operation of what are generally called "services," or at the very least services to the same class and kind of people who would be matched as protégés with advocates. However, even nonservice operations, such as

certain other forms of advocacy, other forms of change agentry, and campaigns of educating the public, can be antagonistic to Citizen Advocacy, as is explained in other contexts.

The good news is that conflicts of interest derived from the governance structure can be removed in two ways.

1. The Citizen Advocacy office is governed as a free-standing corporate agency that does nothing else. In other words, a group of people incorporate themselves as a board of directors, which then hires staff that does nothing but promote Citizen Advocacy, and recruit, match, and support Citizen Advocacy relationships. This structure also assumes that the board as a whole is as free from conflicts of interest as possible. However, this does not require that each single board member has to be free of all conflicts of interest, only that the board as a whole should be. In other words, conflicts of interests by a few otherwise highly desirable members might be tolerable (a) if the conflicts by those board members who have any are not all of the same nature and thus do not summate in the same direction, and (b) if these conflicts are perhaps even at odds with each other. Another way of putting this is that the crucial issue is whether the board in its collective identity has conflicts of interests, and not whether individual board members—or even every single board member—has such.

   Having a conflict of interest is different from appearing to have one, i.e., from observers finding it difficult to believe that there is no conflict of interest. The appearance of conflict of interest is probably mostly a public relations and/or credibility issue, including an issue of image in the eyes of other Citizen Advocacy offices. These issues can be serious, but what we are focusing on here is a real conflict of interest of the board as a whole, not the appearance of such a conflict.

2. Where Citizen Advocacy staff is employed by an agency that also does other things, these other things are not of such a nature as to constitute a significant conflict of interest with Citizen Advocacy. Sometimes, these other things could even be services as long as the Citizen Advocacy staff does not make matches with protégés who are of the same class as might also receive services from this agency. For instance, a Citizen Advocacy office might be added to a pre-existing agency that has been, and is, engaged in activities that do not conflict with Citizen Advo-

cacy; or a pre-existing agency might cease doing certain things that are incompatible with Citizen Advocacy so as to be able to add a Citizen Advocacy office to its other functions.

In essence, Citizen Advocacy offices that are part of the federally supported protection and advocacy offices that are operating in each of the American states are in this situation, in that their parent organization is engaged in advocacy functions that are not of a Citizen Advocacy nature, in protective services, and perhaps even in education of the public and other change agentry.

However, while such situations may be viable for the time being, they carry long-term risks. For instance, where this second path is chosen, one needs to be aware that Citizen Advocacy can experience problems for reasons other than conflict of interest, a big one being plain lack of interest by the governing body, or an insufficient ideological orientation and commitment, or conduct by the agency of other activities that it deems to have higher priorities. Historically, this has unfortunately been a recurring problem, and Citizen Advocacy offices that were not self-governing have had a very problematic history, with few of them surviving very long.

Wolfensberger has long had an entire teaching module that addresses the question whether and when a Citizen Advocacy program should be run by a corporation or agency that does nothing but Citizen Advocacy, or by one that does other things as well, and that perhaps existed before it added a Citizen Advocacy program. All we want to emphasize at the moment is that if Citizen Advocacy is run by a body that does other things, then the minimal requirement is that those other things do not create a conflict of interest. However, it must also be recognized that a body could engage in other activities that are antagonistic to Citizen Advocacy for reasons other than conflict of interest. Again, it is in other forums that Wolfensberger has spelled out what these functions are that are antagonistic to Citizen Advocacy, or even to any kind of advocacy.

Implications to Funding

Conflicts of interest from funding sources are distinct from those from governance sources, though the two can come together, especially if the corporation that governs Citizen Advocacy also does other things. In fact, a conflict of interest around funding can occur simply because within the organization, branches that do things other than Citizen Advocacy may compete with the Citizen Advocacy branch for funds. This would not be a problem if all of the Citizen Advocacy funds came from

sources that earmarked their funds for Citizen Advocacy exclusively. It would likely become a problem in all other situations where funds must be divided among multiple branches of an organization, and where priorities are shifting.

The funding that is at issue in a Citizen Advocacy operation is mostly to pay for Citizen Advocacy staff. In most cases, other Citizen Advocacy office expenses are much lower. Often, Citizen Advocacy offices have even been able to get free or inexpensive office space and equipment.

In the Citizen Advocacy culture, there have been several rules on how to fund Citizen Advocacy, and four that have to do with conflict of interest go back to near the first implementation of Citizen Advocacy in 1970.

1. A Citizen Advocacy office should never be funded by a party that requires that Citizen Advocacy surrender an essential element of its identity, as perhaps by demanding that advocates never use legal resources, that they confine themselves to expressive functions, or that the normative free-agent citizen identity of citizen advocates be denatured by requiring them to act like paid service workers, and/or do paperwork, reporting, etc., such as other citizens would never do in their comparable relationships.

2. Except for a brief initial transition period (a year is usually safe, two years tends to stretch things), a Citizen Advocacy office should not be funded by a party that is likely to be threatened enough by what advocates do so that the party would begin to try to control the Citizen Advocacy operation in a fashion that would weaken it. This requirement means that except for a relatively brief transitional phasing-in period, a Citizen Advocacy office should not be part of an agency that provides services to the same class of people from whom protégés are expected to be drawn. Yet further, it is even risky to accept money over the long run from a body that also and directly funds such a service provider, because advocate actions are eventually apt to prompt such a funder to constrain the advocates via its funding control. However, the type of service to the same class of persons that is funded by the body that also funds Citizen Advocacy may have a bearing on how much risk there is. For instance, there is much greater risk if the funder also funds not just one service but a wide array of services (residential, vocational, casework, and transportation), or if it funds a service that is a major candidate for being "advocated

against," such as a residential agency, than if it only funds—let us say—referral, or job counseling.

Even where the service provider is not the funder of Citizen Advocacy, or even where the service provider's funder is not the funder of Citizen Advocacy, one should strive for "maximally feasible distance" between the source that funds Citizen Advocacy, and the source that funds services to those people for whom Citizen Advocacy recruits advocates.

For instance, a welfare office is apt to have all sorts of societal—rather than client—interests to promote; and furthermore, it is apt to have all sorts of conflicts with its clients, for all sorts of reasons. Thus, such a welfare office would not be a suitable agency to either run—or even to fund—a Citizen Advocacy office that is apt to have protégés who are clients of that welfare office. It may not even be a suitable agency to run a Citizen Advocacy office that does not have protégés who are also clients of the welfare office, because its entire mentality is apt to be steeped too deeply in the welfare office culture to muster the kind of mentality that is necessary in a healthy Citizen Advocacy culture.

These first three rules can all be summarized by the principle of having "maximally feasible distance" between the funds and funding source for Citizen Advocacy, and those parties whom citizen advocates might have to confront.

The fourth principle for minimizing conflicts of interest from funding is that a Citizen Advocacy office should strive to have multiple sources of funding—in fact, as many as possible. There are two rationales for this rule. (a) With multiple sources of funds, and especially if these have non-concurrent fiscal years, the Citizen Advocacy office is less likely to feel threatened and to cave in when one of the funders begins to put pressure on it to hold back its advocates. (b) Funds can dry up for reasons other than hostile attack on Citizen Advocacy. A diversity of funding greatly increases the likelihood that a Citizen Advocacy office will continue to exist over the long run. One rule of thumb is to strive never to have fewer than two major sources of funds, so that the loss of either could be sustained. Of course, the larger the number of funding sources, and the more diverse they are, the less likely is it that the loss of any one source would be crippling to the office's operations.

Funding issues are much harder to resolve than governance issues, because there are so few sources of unconflicted funds, plus in addition, even those sources that do exist tend to be time-limited.

Theoretically, doing without funds would solve the funding issues, but it is of the very essence of Citizen Advocacy to have staff that put the wheels under personal advocacy, and having staff means—in more than 99% of cases—paid staff, hence a need for funds.

Ideally, the most unconflicted enduring source of funds for Citizen Advocacy is an endowment. Very few Citizen Advocacy offices have been fortunate enough to receive such. Those that have receive only a small portion of their income from their endowments, because the endowments themselves have been relatively small so far. More offices could be vigorously pursuing this option, but even then, only a tiny minority of offices are apt to be successful in this quest, and even then would probably never be able to cover 100% of operating costs from this source.

As Wolfensberger explains elsewhere, certain conflicts of interest can only be minimized, never totally eliminated. But it is of the essence of Citizen Advocacy that at least two conflicts be entirely eliminated: (a) payment or other compensation to the advocates, and (b) funding to the Citizen Advocacy office that denatures Citizen Advocacy, either because such funding has conditions attached to it that are incompatible with the very nature of the kind of advocacy that citizen advocates are expected to conduct, or because of the high likelihood that such conditions will be stipulated by the funder in the foreseeable future, after the Citizen Advocacy office has become dependent on it.

One thing should be clear from all the above, namely, that if a Citizen Advocacy office has a conflict of interest, this is most likely to express itself in two ways: (a) recruitment of "tame" advocates, perhaps those mostly interested in the so-called expressive elements of relationships rather than in the instrumental ones that are of an advocacy nature; and (b) poor potentiation of advocates, as via little initial, or inappropriate, orientation to advocacy, and little in the way of potentiating support for it.

Miscellaneous Points

Lest there be any misunderstanding, we emphasize one last time that the functions of the Citizen Advocacy office are different from the functions of the citizen advocate. This needs reiterating because people might easily get confused about this distinction.

We can foresee that the sketching of the four core functions of Citizen Advocacy offices could confuse people as to where safeguarding activities might fit in. Activities that safeguard the identity, quality and viability of a Citizen Advocacy office (discussed in more detail in other contexts) are essential, but many such activities are not unique to Citizen Advocacy. Any enterprise should constantly work on issues of identity, quality and viability. Thus, such activities should not be confused with actually "doing Citizen Advocacy," except that "doing real Citizen Advocacy" would assure identity, and to a large degree quality as well. Viability is only partially under the control of a local office, but generally, "doing real Citizen Advocacy," and doing it well, can be expected to make at least some contribution to viability.

One thing that can hardly be emphasized enough is that the long-term soundness of a Citizen Advocacy program depends primarily on the board of directors; or, if the Citizen Advocacy program is run by an organization that runs other activities, then by the combination of the board and the committee that the board should establish in order to oversee the Citizen Advocacy portion of the agency, i.e., by a Citizen Advocacy "sub-board."

Elsewhere in the Citizen Advocacy culture, one will find various elaborations on the Citizen Advocacy office, such as issues of Citizen Advocacy office governance, who is suited to be Citizen Advocacy staff, funding issues, etc. Here, we only want to very briefly touch on two points.

1. From Citizen Advocacy's first implementation in Nebraska in 1970 (see Wolfensberger & Zauha, 1973), it had been explained that people can function in support roles to Citizen Advocacy offices without being citizen advocates. Such persons were called advocate associates. It is helpful to perceive such advocate associates as an unpaid parallel to the paid Citizen Advocacy staff, and often specifically in the support role in service to advocate potentiation.

2. In Citizen Advocacy training, it has also been emphasized in more detail (a) that a Citizen Advocacy office should never be started without a governing board firmly in place, (b) that matching of advocates and protégés should never be started without paid staff on board, and (c) that it is also desirable (even though rarely possible) to have an office with paid staff at the state/provincial level, both to promote the establishment of Citizen Advocacy offices, and to give such offices ongoing support. (See Wolfensberger & Zauha, 1973, on these points.)

Conclusion

One very large lesson that one can draw from the analysis presented here is that Citizen Advocacy offices should not disguise, or even deny, their identity, as some have actually done. Apparently, this has happened because of distaste for organized services, discomfort about de facto manipulating people into relationships, discomfort about exercising oversight or control over relationships, and possibly other fluffy-minded reasons. But if one understands not only the desirable but also absolutely essential core functions of paid staff as part of the fifth cornerstone of Citizen Advocacy, Citizen Advocacy office people would—or at least should—have no compunctions about professing these functions as their purpose.

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