National
Multiple Sclerosis
Society

Self Advocacy Worksheet

Prepare & take action

This worksheet is designed for you to organize your thoughts and actions for effective self advocacy in various life settings. Review the entire worksheet before you begin but ***respond only to what is relevant to your circumstances.***

Organize

1. Describe your issue or concern and your preferred solution to resolve it.

   Cause: Describe the cause of your unique situation.

   Effect: Summarize what you aim to change. Describe your key intent.

   Issue: Create a summary statement:

   Because: _____, I need or I want _____.

   Practice saying it.

2. List the pros and cons of taking steps toward self advocacy. **This includes identifying positive and negative aspects of your current situation, along with the potential risks and rewards associated with self advocacy.** Identify what you believe must be addressed to meet your unique needs or special concerns. Circle the aspects most important to you.

Pros	Cons

3. Research. Identify questions relevant to your situation or circumstances. Cite references, resources or trusted advisers for answers.

Question	Reference, Resource or Contact Information	Outcome

4. Summarize key research findings and communications. What did you learn about your rights? What about your responsibilities?

My Rights	My Responsibilities

5. Identify who has authority regarding your situation. Begin by determining the front line for customer service, but also be alert for names and contact information of those at higher levels. Put a star next to the name of your first point of contact.

6. Brainstorm possible solutions to address your concern.

7. Review your rights and responsibilities (see 4 above). Revisit question 6. Put a star next to your preferred solution(s), given your rights and responsibilities.

8. Anticipate objections or resistance to your preferred solution(s). Summarize your responses to the likely arguments against your request. Refer to information you can use to support your argument.

Objection	Response	Reference or Resource *in support of your response*

9. Establish a fall-back position or “bottom line” if your preferred solution is not adopted. What are you are willing to settle for?

   What options do you have if your bottom line is not met? Is there a formal review or appeal process? Conduct initial research and determine next steps for an appeal process.

10. Revisit the positive aspects of your situation (see 2 above). Recall these during the course of your self advocacy journey.

Prepare – Determine your method & timing

Prepare
Determine your method and timing. In general, more personal and less formal communication will be perceived as less threatening. Consider the benefits and drawbacks of initially discussing your situation in person, via phone, or in writing. Identify your preferred option.

If you intend to call or visit in person, remember to consider the most convenient time for your point of contact.

Practice
Draft a letter about your issue and the outcome you hope to see. Revisit it a day or two later. Make any necessary revisions. Be concise, clear and cordial. Rephrase any aggressive or disrespectful statements. Include complimentary or positive remarks. Show your revised letter to someone whose judgment you respect. Ask for their feedback.

Role play. Practice how you will state your points. Ask a friend to role play with you. Take a turn advocating your point of view. Switch roles. Listen to your partner advocate your point of view. Pretend you are on the phone, too. Discuss what you observed during the exercise.

Rehearse on your own. Deliver your main points in front of a mirror. Listen to your voice: maintain an easy pace and moderate volume. Watch your facial expressions; try to remain relaxed and open.

Take Action

☐ Review your work above.

☐ Schedule an appointment by placing a call or writing a letter to the front line of customer service who can address your circumstances.

☐ Take detailed notes during your discussion, including names, dates and contact information. Save them along with notes from future conversations, and file them in chronological order. Include any correspondence related to your issue, with the results of any research or other documentation.

☐ Establish next steps and mutual accountability. Agree upon a timeframe for next steps or issue resolution.

☐ Follow up. Provide any promised information or resources within the agreed upon timeframe. Renegotiate if you will be delayed, or if your point of contact fails to respond. Offer to provide additional information or resources to resolve any

questions. Restate your issue and the outcome you hope to see. Commit to a timeframe for issue resolution.

☐ Write a thank you note if you achieve your desired outcome. This is not only polite, but documents your agreement.

☐ *Remember, you may need to follow up to ensure your desired outcome.*

☐ **If you receive no response or an unsatisfactory response,** consider how much additional effort you are prepared to invest. Often, an appeal to a higher level is possible. Research the options relevant to your particular situation. Consider what is at stake to determine whether or not to proceed.

☐ If the situation involves family, broadening the discussion to include a trusted counselor or clergy member may be useful.