



National  
Multiple Sclerosis  
Society

## Self Advocacy for Family Roles and Responsibilities

### Introduction

This guide is intended to assist people with multiple sclerosis address a variety of issues which may arise within the family context. Roles and responsibilities vary from individual to individual and from family to family. The purpose of this guide is not to define these personal relationships, but to anticipate questions and identify appropriate resources to help you navigate the interplay between MS and family dynamics, and advocate for yourself.

The National MS Society's Self Advocacy Worksheet complements this guide. This worksheet is available at <http://staging.nationalmssociety.org/living-with-multiple-sclerosis/advocate-for-yourself/self-advocacy-in-the-family-environment/download.aspx?id=8130>. It is intended to assist you in planning your course of action for self advocacy within the family. Reference it to assess your circumstances, concerns or needs, and to identify your aims or goals. You can also find a sample worksheet at <http://staging.nationalmssociety.org/living-with-multiple-sclerosis/advocate-for-yourself/self-advocacy-in-the-family-environment/download.aspx?id=8140>.

### Disclosing your MS diagnosis

Whether someone is newly diagnosed or has been living with multiple sclerosis for years, inevitably the topic of disclosure arises. How, when and to whom to disclose a diagnosis is a personal decision and varies by individual. You may wish to consider these questions to evaluate how, when and to whom to disclose your diagnosis.

### Questions to ask yourself

- **Why do you want the person to know?**  
To share personal information with an important person in your life? To explain recent physical or emotional changes? To rally assistance and support?
- **What do you want this person to understand about your MS?**  
What MS is? How it affects you? How changeable and unpredictable it is? What you're doing to treat it? That it's not contagious? That it's not fatal? That it's not something else?
- **What is the best way to deliver the information?**  
In a face-to-face conversation? With a pamphlet that the person can take and read? By reading a book about MS together? By watching an online program together? By attending an educational meeting together?

- **What kind of response do you expect to get?**  
Shocked silence? Sadness and tears? Fear? Lots of questions? Stories about other people with MS? Suggestions for what you should do? Offers of assistance? A hug?

To request a printed version of any of the following resources by mail, call an MS Navigator® at 1-800-344-4867.

- **What should I consider before I disclose my MS diagnosis?**  
<http://www.nationalmssociety.org/living-with-multiple-sclerosis/relationships/disclosure/index.aspx>
- **Tips on disclosing to family and co-workers**  
<http://www.nationalmssociety.org/download.aspx?id=47>
- **Disclosure dos and don'ts**  
<http://www.nationalmssociety.org/download.aspx?id=527>
- **How do I tell my spouse I have MS?**
  - **Relationship Matters: The National MS Society's couples program**  
<http://www.nationalmssociety.org/living-with-multiple-sclerosis/relationships/relationship-matters/index.aspx>
  - Contact the National MS Society at 1-800-344-4867 or e-mail: [couplesprogram@nmss.org](mailto:couplesprogram@nmss.org)
- **How do I explain multiple sclerosis to my children?**
  - **Keep S'myelin, the Society's quarterly interactive children's newsletter:**  
<http://www.nationalmssociety.org/multimedia-library/kids-keep-smyelin/index.aspx>
  - To receive **Keep S'myelin**, call your chapter at 1-800-344-4867 or e-mail [keepsmyelin@nmss.org](mailto:keepsmyelin@nmss.org).
  - **Someone You Know Has MS: A book for families**  
<http://www.nationalmssociety.org/multimedia-library/brochures/for-children--teenagers/download.aspx?id=318>
  - **National MS Society video: Timmy's Journey**  
<http://www.nationalmssociety.org/multimedia-library/videos--dvds/timmy's-journey-to-understanding-ms/index.aspx>
- **Teens**
  - **When A Parent Has MS: A teenager's guide**  
<http://www.nationalmssociety.org/multimedia-library/brochures/for-children--teenagers/download.aspx?id=319>

## Roles within the family

In today's world, family roles and responsibilities are as varied as the individuals within the family. As a person living with MS, you may see a need to change the structure of your family as well as the various roles and responsibilities of each family member. Questions and the need for new resources may arise as together all of you tackle new roles and shifting responsibilities.

- **How will our family adjust to new roles within the family structure?**
  - **Multiple Sclerosis: A Guide for Families** (3<sup>rd</sup> Edition) by Rosalind C. Kalb, PhD. \$24.95, Demos Medical Publishing (2006) ISBN # 1932603107  
<http://www.nationalmssociety.org/multimedia-library/books/a-guide-for-families/index.aspx>
  
- **Family members as caregivers**
  - **[The Comfort of Home, Multiple Sclerosis Edition: An Illustrated Step-by-Step Guide for Caregivers](#)** by Maria M. Meyer and Paula Derr, \$24.95, Demos Medical Publishing (2006) ISBN # 096647676X
  
  - **[A Family Caregiver Speaks Up](#)** by Suzanne Geffen Mintz, \$14.95, NFCA, (2007)  
[http://thefamilycaregiver.org/caregiving\\_resources/a\\_family\\_caregiver\\_speaks\\_up.cfm](http://thefamilycaregiver.org/caregiving_resources/a_family_caregiver_speaks_up.cfm)
  
  - **Respite Care**  
National MS Society chapters can provide referrals to respite care services. To find your chapter visit <http://www.nationalmssociety.org/find-a-chapter/index.aspx> or call 1-800-344-4867.
  
  - **National Family Caregivers Association**  
<http://thefamilycaregiver.org/index.cfm> or call 1-800-896-3650
  
- **How do we resolve issues and promote communication as a family?**  
National MS Society chapters can provide referrals to support groups and professional counselors. To find your chapter visit <http://www.nationalmssociety.org/find-a-chapter/index.aspx> or call 1-800-344-4867.

## Intimate Relationships

Intimate relationships are crucial to creating and maintaining a family. Living with MS can bring about a component of uncertainty to those relationships. The following resources will aid you in answering questions that may arise between you and your partner when MS is a factor.

- **How will MS affect my marriage?**
  - **Webcast: Positive Relationships**  
Positive Relationships featuring Jude Meyer, Clinical Psychologist  
<http://www.nationalmssociety.org/multimedia-library/webcasts--podcasts/positive-relationships/index.aspx>
  - **Relationship Matters: A Program For Couples Living with MS**  
<http://www.nationalmssociety.org/living-with-multiple-sclerosis/relationships/relationship-matters/index.aspx> or contact the National MS Society at 1-800-344-4867 or [couplesprogram@nmss.org](mailto:couplesprogram@nmss.org)
- **Does MS affect a couple's intimacy?**
  - **Intimacy and Sexuality in MS: Staying Well**  
<http://www.nationalmssociety.org/download.aspx?id=152>
  - **Enabling Romance** by Ken Kroll and Erica Levy Klein, \$5.95, No Limits Communications (2001) ISBN # 0971284202  
<http://www.nationalmssociety.org/multimedia-library/books/enabling-romance/index.aspx>
  - **The Sexual Health Network**  
Provides information on sexuality for those with disabilities and illnesses.  
<http://www.sexualhealth.com/>
  - **The Marriage and Family Health Center**  
Offers sexuality education and therapy programs.  
<http://www.passionatemarriage.com/> or call: 1-303-670-2630
- **Dating**
  - **Will MS affect my ability to date?**
    - **Real Talk Real Answers: Living with MS in your 20s and 30s**  
(National MS Society online program)  
<http://www.realtalkrealanswers.com/>
  - **When and how do I tell the person I am dating that I have MS?**
    - **Dating Online: a Guide for Greenhorns**, from **Inside MS**, August-September 2007  
<http://www.nationalmssociety.org/download.aspx?id=281>

### **Family Planning**

Some couples may be well along the path of raising children when MS enters their lives. For others, the diagnosis may come before family planning decisions have been made. Therefore, a number of questions may arise regarding whether to have a family when MS is a factor. The following resources and probable questions will help you to become your own best advocate in this process.

To have a printed copy of any of the following mailed to you, call an MS Navigator® at 1-800-344-4867.

- **As a couple with MS, do we still have the ability to have children?**
  - **MS & Pregnancy Kara's Story**, National MS Society video  
<http://www.nationalmssociety.org/multimedia-library/videos--dvds/ms--pregnancy/index.aspx>
  - **Reproductive Issues in Persons with Multiple Sclerosis** by Barbara Geisser, MD.  
<http://www.nationalmssociety.org/download.aspx?id=168>
  - **Pregnancy and Reproductive Issues**  
<http://www.nationalmssociety.org/living-with-multiple-sclerosis/healthy-living/pregnancy/index.aspx>
  - **Talking about Reproductive Issues** by Rosalind Kalb, PhD.  
<http://www.nationalmssociety.org/download.aspx?id=174>
  - **MS and Pregnancy**, from **Inside MS**, April-June 2003.  
<http://www.nationalmssociety.org/download.aspx?id=58>

#### **Fertility and the MS disease-modifying drugs**

- **Do the disease-modifying drugs affect contraception, fertility, pregnancy? Delivery or breastfeeding?**
  - **Medical Management During Pregnancy, Delivery, and Postpartum**  
<http://www.nationalmssociety.org/living-with-multiple-sclerosis/healthy-living/pregnancy/pregnancy-registry/index.aspx>
  - **Pregnancy Registries for the Interferon Beta Products Prescribed for Women with MS**  
<http://www.nationalmssociety.org/living-with-multiple-sclerosis/healthy-living/pregnancy/pregnancy-registry/index.aspx>
    - **Avonex Registry**  
<http://www.nationalmssociety.org/living-with-multiple-sclerosis/healthy-living/pregnancy/pregnancy-registry/download.aspx?id=12>
    - **Betaseron Registry**  
<http://www.nationalmssociety.org/living-with-multiple-sclerosis/healthy-living/pregnancy/pregnancy-registry/download.aspx?id=13>

- **Rebif Registry**

<http://www.nationalmssociety.org/living-with-multiple-sclerosis/healthy-living/pregnancy/pregnancy-registry/download.aspx?id=19>

- **Is there a risk that my children may develop MS?**

**Transmitting MS to Children: Possible Differences in Men and Women**

<http://www.nationalmssociety.org/news/news-detail/index.aspx?nid=90>

## **Additional Resources**

### **Financial Planning for the Future**

- **Guidebook: Adapting: Financial Planning for a Life with Multiple Sclerosis**

<http://www.nationalmssociety.org/download.aspx?id=11>

### **What types of financial issues should our family plan for?**

- **Vehicle Modification (Adapted Vehicles)**

<http://www.nationalmssociety.org/living-with-multiple-sclerosis/mobility-and-accessibility/buying-an-adapted-vehicle/index.aspx>

- **Home Modification (Universal Design/stair lift)**

<http://www.nationalmssociety.org/living-with-multiple-sclerosis/mobility-and-accessibility/affording-stair-lifts-ramps-and-wheelchairs/index.aspx>

- **How will having MS affect my family's health insurance?**

<http://www.nationalmssociety.org/living-with-multiple-sclerosis/insurance-and-money-matters/health-insurance/faqs-health-insurance/index.aspx>



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## Self Advocacy Worksheet (Sample – Family)

### 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.

My family used to be extremely close but since my diagnosis with MS everything has changed for the worse. My kids barely speak to me and avoid being around our home and my spouse and I constantly argue. I want my family to be as close as we once were and not allow MS to change the quality and quantity of time we spend as a family as well as how we communicate with each other. I hope to find a way to open communication and repair our family relationships.

Cause: Describe the cause for your unique situation.

Due to chronic fatigue and additional MS-specific symptoms such as drop foot and vision problems, driving is difficult for me at this time. This has placed additional strain on my spouse whom now is responsible for picking up and dropping off the children from school and recreational activities. Recently I also have missed several of my children's plays and games due to doctor appointments.

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

I aim to change the way I communicate with my family. I hope to offer more support to my spouse in other ways to alleviate her strain and change the way I interact with my children to help them learn about MS and not allow it to affect the way they see and communicate with me.

Issue: Create a summary statement.

Symptoms of my MS have put a strain on relationships within my family, especially regarding communication. I will use communication

and solution-seeking, not accusations, to create an open dialogue among me, my spouse and our children, and reunite our family.

Because: I love my spouse and children

I need or I want: to change the way we communicate with each other.

**Practice saying it.**

- 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
Creating an open dialogue with my spouse will help address current problems and help us identify solutions. It may also strengthen our relationship.	We may just continue to argue, which could intensify and lead to a divorce.
Helping my children understand MS will encourage them to spend time with me and ask questions instead of continuing to avoid both MS and me.	The children may not want to learn about MS and may become even more afraid of both me and the disease after learning more about it.

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

Question	Reference, Resource or Contact Information	Outcome
How do I open communication with my spouse instead of just arguing?	National MS Society (Relationship Matters) <a href="http://www.nationalmssociety.org/living-with-multiple-sclerosis/relationships/relationship-matters/index.aspx">http://www.nationalmssociety.org/living-with-multiple-sclerosis/relationships/relationship-matters/index.aspx</a> or call 1-800-344-4867	My spouse and I begin to communicate and develop a plan to strengthen our marriage.
How do I explain MS to my children?	National MS Society (list of resources for children: books, tapes, DVDs) <a href="http://www.nationalmssociety.org/multimedia-library/brochures/for-children--teenagers/index.aspx">http://www.nationalmssociety.org/multimedia-library/brochures/for-children--teenagers/index.aspx</a> or call 1-800-344-4867 to find your chapter and list of resources.	My children become less afraid of MS and are willing to spend time with me. I can answer the questions they

	<b>Keep S'myelin</b> (MS newsletter for kids) Call your chapter at 1-800-344-4867 or e-mail <a href="mailto:keepsmyelin@nmss.org">keepsmyelin@nmss.org</a> .	have or find resources to help explain.
Are there any MS support groups in my area for me, couples and/or parents with MS?	National MS Society (find your chapter) <a href="http://www.nationalmssociety.org/find-a-chapter/index.aspx">http://www.nationalmssociety.org/find-a-chapter/index.aspx</a> or call 1-800-344-4867 to contact your chapter and obtain a list of local support/self-help groups	We find the right support group for us.
Is there a way to obtain referrals for professional help, e.g. family counselors?	National MS Society (find your chapter) <a href="http://www.nationalmssociety.org/find-a-chapter/index.aspx">http://www.nationalmssociety.org/find-a-chapter/index.aspx</a> or call 1-800-344-4867 to contact your chapter and obtain referrals for counselors in your area.	We find the right counselor for our family or as individuals in order to work on our communication and family concerns.

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

My Rights	My Responsibilities
To communicate openly and effectively with my family.	To communicate with my family and offer them support as well.
To live in a peaceful environment.	To stop arguing with my spouse.
To remain living with my family.	To ensure that my family can continue living with me.
To seek professional help when a problem is too big to handle on my own.	To acknowledge my family members' stake in resolving our problems and let them be part of crafting solutions.

5. Identify who has authority in 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.

I have the most authority regarding my own personal situation. My marriage is a partnership; therefore my spouse and I have equal authority over our marriage and children.

6. Brainstorm possible solutions to address your concern.
  - A) Hold a family meeting to discuss issues and set up a plan.
  - B) Host individual time with my spouse and each child to create an open dialogue.
  - C) Attend a National MS Society support group that meets my needs (for people with MS, couples, or parents with MS).
  - D) Attend personal and or professional counseling.
  
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 in response to your request. Reference information you can use to support your argument.

Objection	Response	Reference or Resource <i>in support of your response</i>
How can we trust a stranger to help us with private family matters?	<p>We can obtain referrals from the National MS Society for counselors who are familiar with MS and family dynamics.</p> <p>We can also attend a self help group to meet people dealing with similar issues, as well as to help us become more comfortable communicating with each other.</p>	Find your chapter and obtain referrals to counselors and self help groups by calling the National MS Society at 1-800-344-4867.
We are all too busy and there is too much work around the house to make time for a family meeting. How can you even suggest counseling or a support group?	Our family is too important to not make time. We can find resources, e.g. hire a housekeeper or enroll the kids in a carpool for afterschool activities, to make time to talk. We can try a support group or family counselor.	Find your chapter and obtain referrals to counselors and chore services by calling the National MS Society at 1-800-344-4867.

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

If communication does not improve around our home, I am willing to try family counseling with my wife and children.

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.

If family negotiations do not quickly yield better results, I may have to think about steps I can take on my own. Time apart may be helpful. As a last resort, I may have to consider options for more formal and lasting separation. At that point, consulting a divorce attorney would be advisable.

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.



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## What is Self Advocacy?

**Self advocacy** means speaking up for yourself. It refers to your ability to effectively communicate an interest, desire, need, or right — and negotiate to get it. It also means making informed decisions and taking responsibility for them. Effective self-advocates understand individual strengths and needs, identify personal goals, and recognize legal rights and responsibilities. The impact of effective self advocacy reaches far beyond the individual; concrete changes and decision-makers with enlightened perspectives can have a lasting impact on many others as well.

### Self advocacy throughout life

This self advocacy guide discusses effective practices and communication styles for you to best represent yourself and your interests throughout life. Whether you or a loved one lives with multiple sclerosis, effective self advocacy is a life skill sure to improve outcomes, regardless of the need or situation. The self advocacy worksheet that accompanies this material is a practical tool to help you turn this information into real-world results.

### Effective practices for self advocacy:

- ❖ Assess your situation. **Describe your limitations, your unique needs or your special concerns.**
- ❖ Consider and evaluate useful aids, accommodations or solutions for your situation. **Define what will meet your needs or address your concerns.** Identify your desired outcome.
- ❖ Research and know your legal rights related to the situation. **Summarize your points for discussion.** Rehearse with a family member or friend.
- ❖ Identify those who may have the authority to meet your needs. **Contact or visit the front line for customer service first.** Invite a friend or family member to join you for an in-person meeting.
- ❖ **Anticipate the reaction to your request.** Consider potential reasons for resistance to your request. Try to understand the other person's point of view.
- ❖ **Be concise.** Describe your unique needs or your special concerns.
- ❖ **Remain mindful of your desired outcome.** Stay open to all potential avenues to achieve it.

- ❖ Be honest. Share any positive aspects about your situation or your circumstances which you benefit from, appreciate or value. **Cultivating empathetic allies can only help your cause.**
- ❖ **Document your discussion.** Record the name of the person you speak with, as well as the date, time, key points and necessary follow-up.
- ❖ **Be persistent.** Identify the next level of authority if you are unable to address your unique needs or concerns during negotiations.
- ❖ **Request the decision-maker's response in writing.** Know your appeal rights.
- ❖ **Be organized in your approach.** Use registered mail, keep copies of documents, track dates, take detailed notes, use checklists and make use of any organizational tools or systems that will help you to be more effective.

#### **Effective communication styles for self advocacy:**

- ❖ **Always tailor your style and message to the perspectives of your audience.**
- ❖ **Exhibit self-confidence.** Communicate with conviction. Comprehend the facts.
- ❖ Listen and ask questions. **Seek solutions in a collaborative fashion.**
- ❖ Conduct a dialogue. **Be conversational.** Pause to hear the other person's point of view. Maintain eye contact and a receptive facial expression.
- ❖ Exhibit respect. **Be assertive, but not aggressive.** Avoid accusations, judgments and exaggerations. Attempt to minimize displays of emotion.
- ❖ Dress appropriately for the situation. Thank the person for their time. **Be polite.**
- ❖ If communicating via letter or e-mail, **use standard spelling and grammar.** Avoid slang. Proofread.
- ❖ **Establish mutual accountability.** Determine the next steps, who will complete them, and target dates.



### 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

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

My Rights	My Responsibilities

- 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.
- Brainstorm possible solutions to address your concern.
- 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.
- 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 <i>in support of your response</i>

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.
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- 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.

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**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.