

Advocacy Among Counseling Leaders: A Constructivist Grounded Theory

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Dedication

This dissertation is dedicated to my two grandmothers Josefina Otero and Gladys Rojas - the two strongest women I know. Your strength in times of hardship is inspiring, and your wisdom is invaluable. I am grateful for your passion for education that changed the future for our entire family. I remember conversations as a young child with both of you telling me education is the greatest asset I will ever have. Thank you for inspiring your children, grandchildren, and great grandchildren. We truly would not be here if it wasn't for both of you.

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Lastly, to Venezuela, my native country whose citizens are struggling to use their voice against social and political injustices. I hope your voice is heard soon by the national and international community and one day you return to your former splendor.

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Abstract

Social/political or legislative professional advocacy is vital for growth of the counseling profession. However, knowledge regarding social/political professional advocacy is limited by a lack of empirical evidence. The purpose of this constructivist grounded theory study was to explain the process of social/political professional advocacy for counseling leaders. The research question guiding this study was *what is the process of social/political professional advocacy for counseling leaders?* Constructivist grounded theory (Charmaz, 2014) was used to analyze fifteen semi-structured interviews with professional counselors who engaged in leadership related to social/political professional advocacy. During analysis, four major themes emerged, *Connection to Personal and Professional Identity*, *Use of Personal and Professional Community*, *Making it your Own*, and *Picking your Battles*. Findings suggested that the legislative professional advocacy process involved three tiers *Advocacy Catalyst*, *Advocacy Action*, and *Advocacy Training*. The *Advocacy Catalyst* provided connection to the advocacy need. *Advocacy Action*, involved ways that advocates acted upon advocacy by picking battles and making it their own. *Advocacy Training* provided participants with support and knowledge to apply to their *Advocacy Action*. In addition, using an aggregate of the participants' own perspective and experience, a definition of legislative professional advocacy was proposed. Based on these findings, implications for counselor education programs and professional organizations and recommendations for future research were provided.

Keywords: Legislative professional advocacy, professional counselors, professional organizations, leaders, counselor education, constructivist grounded theory

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Chapter 1: Introduction

The counseling profession is experiencing rapid growth and is at a point in its development that has increased national recognition. The increased recognition intensifies the demand for a unified professional identity, stronger voice in the community, and consistent training and licensure standards. Just as social/political professional advocacy was critical in establishing counseling as a unique profession with complete licensure in all states, social/political professional advocacy continues to be vital for fulfilling current and future demands that comes with growth (Dixon & Dew, 2012). Social/political professional advocacy focuses on addressing policies that create problems for clients, clients' community, and the profession (Toporek, Lewis, & Crethar, 2009). The ACA has recognized that social/political professional advocacy is an area of growth for the profession, and called for "a stronger, more defined voice at the state and federal levels" (Kaplan & Gladding, 2011, p. 371). In this section, I will outline two leading movements in the counseling profession on professional advocacy, the *20/20 vision* and the Council for Accreditation of Counseling and Related Programs (CACREP) standards (2016).

The 20/20 Vision

From 2005-2013, 31 professional counseling organizations worked together to develop a strategic plan for the development of the counseling profession in year 2020 (Kaplan & Gladding, 2011). The strategic plan was later named *Principles for Unifying and Strengthening the Profession* (Kaplan & Gladding, 2011) and often abbreviated as the *20/20 vision*. Kaplan and Gladding (2011) outlined the following seven areas of focus:

1. Sharing a common professional identity is critical for counselors.
2. Presenting ourselves as a unified profession has multiple benefits.

3. Working together to improve the public perception of counseling and to advocate for professional issues will strengthen the profession.
4. Creating a portability system for licensure will benefit counselors and strengthen the counseling profession.
5. Expanding and promoting our research base is essential to the efficacy of professional counselors and to the public perception of the profession.
6. Focusing on students and prospective students is necessary to ensure the ongoing health of the counseling profession.
7. Promoting client welfare and advocating for the populations we serve is a primary focus of the counseling profession. (p. 372)

The profession has made significant progress toward the *20/20 vision* (Kaplan & Gladding, 2011). To present counseling as a unified profession, 29 major counseling organizations reached consensus on a unified definition of counseling: “counseling is a professional relationship that empowers diverse individuals, families, and groups to accomplish mental health, wellness, education, and career goals” (Kaplan, Tarvydas, & Gladding, 2013, p. 92). According to Kaplan et al., (2013) the new definition built of a “strong foundation” (p. 92) for the continued development and unity of the counseling profession and the achievement of the *20/20 vision*. Another major success of the *20/20 vision* is the approval of counselors to be Veterans Affairs and Tricare providers and the addition of California as the 50th state to enact counseling licensure in 2009. These milestones improved the public perception and recognition of the counseling profession.

Licensure portability has also been a primary goal of the *20/20 vision* (Kaplan & Gladding, 2011). The goal is for licensed counselors who met certain criteria to be able to move

freely between states that have different licensure boards, processes, and standards (Yep, 2017). License portability unifies the profession and its identity, promotes common standards to ensure the quality of counselors, increases public access to qualified care, and reduces administrative duties from licensure boards (AMHCA, 2017). To achieve portability goals, the ACA implemented *The Building Blocks to Portability Project*. The project's goal was to craft a consensus regarding counseling licensure title, scope of practice, and education requirements that can be used as criteria across the United States. By 2013, the *20/20 vision* delegates agreed on a licensure title (Licensed Professional Counselor) and scope of practice. In 2017, ACA, NBCC, the Association for Counselor Education and Supervision (ACES), the American Mental Health Counselors Association (AMHCA) and the American Association of State Counseling Boards (AASCB) came to a consensus over common education criteria, which included CACREP standards (2016). The next step to make portability a reality is for individual state counseling licensing boards across the United States to agree to adopt the *Building Blocks to Portability*.

The CACREP Standards

The importance of counselor knowledge and skills regarding social/political professional advocacy is reflected in several CACREP *2016 Standards*. CACREP requires that core faculty members in training programs provide service and advocacy to the profession. Training programs must also integrate attention to leadership and advocacy as part of professional identity curricula for master's and doctoral programs. Specifically, all master's students must have curricular experiences that include:

- the role and process of the professional counselor advocating on behalf of the profession (2.F.1.d)

- advocacy processes needed to address institutional and social barriers that impede access, equity, and success for clients (2.F.1.e)
- professional counseling organizations, including membership benefits, activities, services to members, and current issues (2.F.1.f)
- professional counseling credentialing, including certification, licensure, and accreditation practices and standards, and the effects of public policy on these issues (2.F.1.g)
- theories and models of multicultural counseling, cultural identity development, and social justice and advocacy (2.F.2.b).

Additionally, nearly all specialty area standards require cover of “legislation and government policy” relevant to practice in that setting (p. 22), and several areas include standards relevant to advocating for clients within work settings.

Furthermore, CACREP asked doctoral programs to “equip students to assume positions of leadership in the profession and/or their area(s) of specialization” (p. 28) and defined leadership and advocacy as one of five core curricular areas. Specifically, all doctoral students must have curricular experiences that include:

- theories and skills of leadership (6.B.4.a)
- leadership and leadership development in professional organizations (6.B.4.b)
- leadership in counselor education programs (6.B.4.c)
- leadership, management, and administration in counseling organizations and other institutions (6.B.4.e)
- strategies of leadership in consultation (6.B.4.g)

- current topical and political issues in counseling and how those issues affect the daily work of counselors and the counseling profession (6.B.4.h)
- role of counselors and counselor educators advocating on behalf of the profession and professional identity (6.B.4.i)
- models and competencies for advocating for clients at the individual, system, and policy levels (6.B.4.j)
- strategies of leadership in relation to current multicultural and social justice issues (6.B.4.k)
- ethical and culturally relevant leadership and advocacy practices (6.B.4.l)

The CACREP standards aid in regulating counselor training and standardizing professional identity; however, are they not currently used nationwide. Due to CACREP's effectiveness in providing a strong professional foundation, the counseling profession is moving forward in using the CACREP standards as a common set of educational standards. For example, CACREP (2013) reported that over one-half of state licensure boards identify graduation from a CACREP-accredited program as an option for meeting educational requirements for licensure. Specifically, Kentucky, New Hampshire, North Carolina, and Ohio recently enacted rule changes to require graduation from CACREP-accredited programs for licensure. Beginning in 2022, the National Board of Certified Counselors will require graduation from a CACREP-accredited program for certification as a National Certified Counselor (NBCC, 2014).

The *20/20 vision* and the CACREP (2016) standards have been fundamental to the growth of the counseling profession and understanding regarding the importance of social/political professional advocacy. ACA's 2014 call to action in professional advocacy continues to be true today, especially in wake of recent political climate in which some bodies of

government have targeted counselors and their clients with harmful legislation. For example, in 2016, the state of Tennessee enacted HB 1840/SB 1556 into law which permits licensed professional counselors who work in private practice to refer clients whose presenting problem goes against counselors' strongly held beliefs (Canady, 2016). This law directly contradicted the ACA's *Code of Ethics* (2014), leading a number of professional counseling leaders and association representatives to speak in direct opposition to the law (Yep, 2016). In 2017, Tennessee proposed a bill that would prohibit the Board of Licensed Professional Counselors from adopting any code of ethics developed by an outside organization, specifically mentioning the *Code of Ethics* (ACA, 2014). Although this bill did not pass, Georgia, Mississippi, and North Carolina are in the process of promoting "religious freedom" laws (Margolin, 2016) that may affect welfare of clients and the profession directly. Most recently, Arizona introduced the House Bill 2406, which would eradicate licensure and compromise employment and reimbursement for professional counselor (NBCC, 2017). The ACA believes that increased counselor presence and advocacy in state and federal governments will assist in preventing harmful legislation and promoting professional development (Kaplan & Gladding, 2011; Yep, 2017).

Statement of the Problem

By practicing social/political professional advocacy, counselors help government officials better understand the counseling profession and needs of community members. Aside from ACA's *20/20 vision* efforts and CACREP's *2016 Standards*, there is relatively little scholarly guidance regarding social/political professional advocacy. Although the *Advocacy Competencies* (Lewis, Arnold, House, & Toporek, 2002), discussed in depth in Chapter two, provide some recommendations regarding social/political professional advocacy, the competencies do not provide a clear picture regarding how professional counselors navigate

complexities of social/political professional advocacy. In addition, a literature review of articles addressing advocacy competencies for counselors yielded 128 articles, of which 61 focused on microsystemic, individual interventions, 51 focused on mesosystemic interventions, and only 16 addressed advocacy at a exosystemic level. Only six articles specially addressed social/political professional advocacy. Furthermore, most counselors do not receive formal training on professional or social/political advocacy (Sweeney, 2012; Toporek et al., 2009).

Social/political professional advocacy vital for continued development of the counseling profession (Dixon & Dew, 2012), a core component of counseling identity (CACREP, 2016), and essential for attaining the *20/20 vision* (Kaplan & Gladding, 2011). Given goals, issues, and obstacles the counseling profession currently faces, counseling leaders must be active participants in social/political professional advocacy.

Purpose of the Study

To date, understanding of social/political professional advocacy practices is limited by a lack of empirical evidence. Enhanced clarity regarding professional counseling leaders' engagement in social/political advocacy may help illuminate opportunities to better equip professional counselors for advocacy demands. The purpose of this constructivist grounded theory study was to develop a theory to explain the process of social/political or legislative advocacy for counseling leaders. The research question that guided the study was: *what is the process of social/political professional advocacy for counseling leaders?*

Significance of the Study

Results from this study may improve understanding of social/political professional advocacy and influence training of future counseling leaders. This study provided more clarity regarding how leaders enact social/political professional advocacy and resulted in a proposed

framework for implementing social/political professional advocacy. Additionally, professional counselors may use information from this study to inform development of a framework for training advocates and leaders in master's and doctoral counseling programs and serve as a model for professional counselors who find themselves engaging in social/political professional advocacy. Lastly, this study may provide insight regarding the type of resources and skills leaders need for successful social/political professional advocacy.

Definitions of Terms

There are multiple terms I frequently use in this study. The following definitions will serve as a reference to increase understanding and provide clarity of these terms.

Advocacy is a process to achieve a goal that empowers the counseling community and its clients. Professional advocacy includes contacting, discussing, or debating issues that directly affect the profession; social justice advocacy is action toward social issues and inequality (McKibben, Umstead, & Borders, 2017).

Advocacy Competencies refers to a competency document developed by Lewis et al. (2002) and endorsed by the American Counseling Association Governing Council. The *Advocacy Competencies* specify hands-on, action-oriented skills that assist professionals to engage professional and social justice advocacy. Within the *Advocacy Competencies*, **social/political advocacy** involves addressing, communicating, promoting, and acting upon public policy and legislation. Furthermore, **social/political professional advocacy** refers to efforts to influence public policy and legislation that directly affect the counseling profession.

For the purpose of this study, I define **counseling leaders** as professional counselors that engaged in leadership related to advocacy efforts.

Organization of the Study

In chapter two, I review advocacy as described in the counseling literature including special attention to definitions and types of advocacy as described in the *Advocacy Competencies* (Lewis et al., 2002). Furthermore, I review studies that address each level of advocacy intervention using the *Advocacy Competencies* framework. Finally, I address literature regarding advocacy training in counselor education. In chapter three, I utilize Charmaz's (2014) framework to present methodology for a constructivist grounded theory study focused on the process of legislative advocacy for counseling leaders. I outline sampling, data collection, data analysis, rigor procedures, and limitations for this study. In chapter four, I provide study findings with attention to exemplary quotes that best capture these findings. Finally, in chapter five, I discuss results, practice implications, and further areas of research.

Chapter 2: Review of the Literature

I begin this chapter with reviewing advocacy as described in the counseling literature including special attention to definitions and types of advocacy. Next, I outline American Counseling Association (ACA) competencies related to advocacy, delineating their framework. Utilizing the structure set by the *Advocacy Competencies*, I review studies that address each level of advocacy intervention, with some attention to recommendations related to social/political advocacy in related mental health professions. Finally, the chapter concludes with a review of studies regarding advocacy training in counselor education, including four pedagogical models that may inform training. Throughout all sections, I attend to implications and limitations for counselor leaders.

Advocacy

I open this section with an exploration of advocacy among professional counseling associations, with special attention to how they define and integrate advocacy. I end this section identifying two types of advocacy and providing examples regarding how they look in action.

Over the last thirty years, the ACA has made significant strides toward promoting advocacy and social justice in counseling. This commitment is reflected in the development and endorsement of multicultural counseling competencies (Sue, Arredondo & McDavis, 1992) and advocacy competencies (Lewis et al., 2002). The ACA has also endorsed the following competencies to promote culturally relevant strategies with diverse populations: 1) *Competencies for Addressing Spiritual and Religious Issues in Counseling* (Cashwell & Watts, 2010); 2) *Competencies for Counseling Transgender Clients* (ALGBTIC Taskforce, 2009); 3) *Competencies for Counseling Lesbian, Gay, Bisexual, Queer, Inter sex, Questioning and Ally Individuals* (LGBQIQA) (ALGBTIC LGBQQIA Competencies Taskforce, 2013); 4) *Animal-*

Assisted Therapy in Counseling Competencies (Stewart, Chang, Parker, Grubbs, 2016); 5) *Multicultural Career Counseling Competencies* (NCDA, 2009); and 6) *Competencies for Counseling the Multiracial Population* (Kenney et al., 2015). Most recently, the ACA endorsed a revised set of *Multicultural and Social Justice Counseling Competencies* (Ratts, Singh, Nassar-McMillan, Butler, and McCullough, 2016).

ACA defined advocacy as the “promotion of the well-being of individuals, groups, and the counseling profession within systems and organizations” (2014, p. 20). ACA’s definition is a call to action to “remove barriers and obstacles that inhibit access, growth, and development” (ACA, 2014, p. 20). The call to action is rooted in the ACA’s definition of advocacy and in advocacy practices embedded throughout the organization’s standards. Specifically, “advocacy” is mentioned seven times in the *ACA Code of Ethics* (2014), and it is the first item discussed in the “Roles and Relationships at Individual, Group, Institutional, and Societal Levels” section (p. 5) of the code, thus, establishing advocacy as a primary function of the professional counselor.

Another major force in the counseling profession is CACREP. CACREP creates, monitors, and enforces training standards in counselor education. These standards are guided by the counseling literature and founded upon best practices for counselor development. CACREP defined advocacy as taking action “on behalf of clients or the counseling profession” (2009, p. 59). CACREP further noted that action oriented advocacy is meant to

“promote individual human worth, dignity, and potential; and oppose or work to change policies and procedures, systemic barriers, long-standing traditions, and preconceived notions that stifle human development” (p. 59).

As outlined in Chapter One, advocacy is multiple times in CACREP’s *2016 Standards* and appears primarily in the core curricular areas for master's programs. CACREP (2016) also

embedded advocacy in the standards for specialty counseling areas. Likewise, advocacy is a focus of one of five core areas for doctoral program curricula. The *2016 Standards* continued to encourage counselor education programs to embed advocacy in every aspect of training as a major foundation for counselor identity (CACREP, 2016). In essence, CACREP placed advocacy practices at the forefront of counselor training and development.

Chi Sigma Iota (CSI), the international honor society for professional counselors, is a third major force in leadership and advocacy. CSI built their vision, mission and strategic plan around leadership and advocacy. CSI's goals include promoting and recognizing "outstanding leadership and advocacy" (CSI, 2009, p. 1) as well as providing "leadership and advocacy opportunities to members" (CSI, 2009, p. 1). To achieve the outlined goals, CSI developed the *Journal of Counselor Leadership and Advocacy* (JCLA) and published newsletter tips regarding advocacy that can be found in a 23-page *Professional Advocacy Tips* found on CSI's website (csi-net.org). Additionally, CSI divided advocacy into six major themes of counselor education: intra-professional relations, marketplace recognition, inter-professional issues, research, and client wellness (Sweeney, 1998). For counselors who wish to be active counselor advocates, CSI has become a major source of support, knowledge, and opportunity.

Definitions of advocacy provided by ACA, CACREP, and CSI are widely accepted in the counseling profession; however, there is no unified definition of advocacy. Toporek and Liu (2001) defined advocacy as "action taken by a counseling professional to facilitate the removal of external and institutional barriers to clients' well-being" (p. 387). Definitions adopted by ACA (2014) and CACREP (2016) mirror the definition offered by Toporek and Liu (2001) as action-oriented on behalf of others to promote growth and well-being. Clients, organizations, and the community can advocate for themselves; however, access to resources might be limited to action

due to institutionalized oppression (Toporek, 2006). Toporek (2006) added that counselors are in positions of power and privilege to take action. Although there is not a universal definition of advocacy in counselor education, it is clear that counselors are responsible for removing obstacles and giving voice to the community.

Although advocacy definitions cover roles and goals of advocacy, there is a lack of clarity about the purpose of advocacy. Some authors define advocacy as connected with and dependent on social justice (e.g., Green, Mccollum, & Hays, 2008; Ratts, Singh, Nassar-Mcmillan, Butler, & McCullough, 2016; Steele, 2008; Toporek, 2006; Toporek & Liu, 2001). Others define advocacy and social justice as independent concepts (e.g., ACA, 2014; Lewis et al., 2002). Toporek and Liu (2001) claimed that advocacy required social action geared towards social justice. In contrast, ACA (2014) defined advocacy as the “promotion of well-being” (p. 20) and social justice as “the promotion of equity” (p. 21). To clarify distinctions between advocacy and social justice, I describe types of advocacy and distinctions between professional and social justice advocacy in the following section.

Types of Advocacy

In a content analysis study, McKibben et al. (2017) found that lack of consensus in the literature comes from the fact that there are two types of advocacy: professional and social justice. ACA (2014), CACREP (2016), and Toporek and Liu (2001) all merged both types of advocacy in their definition. However, McKibben et al. (2017) argued that professional advocacy and social justice advocacy are inherently different in purposes and goals.

McKibben et al. (2017) defined professional advocacy as action towards “professional practice and policy” (p. 194). This type of advocacy is action oriented and involves “contacting, discussing, or debating issues” that directly affect the counseling profession and counseling

programs (McKibben et al., 2017, p. 194). For example, efforts made by counseling leaders of ACA, National Board for Certified Counselors (NBCC), American Mental Health Counselors Association (AMHCA), and American Association of State Counseling Boards (AASCB) toward counseling licensure portability constitutes professional advocacy.

McKibben et al. (2017) defined social justice advocacy as action toward social issues and inequality. Actions can include educating the community and infusing multiculturalism in counseling and counselor education. For example, a counselor who works in a low income, rural community may partner with organizations to donate immediate "basic needs" to the community, including food and clothing. In addition, the counselor may partner with doctors and dentists to come to the community once a month to provide free or affordable health and dental screenings.

It is possible for some issues and actions to incorporate both professional and social justice advocacy. For example, counseling leaders in Tennessee conducted educational sessions, held press conferences, talked to representatives and lobbyists, and maintained community involvement in efforts to stop Tennessee law SB 1566/HB 1840. Passed in 2016, SB 1566/HB 1840 permits professional counselors to refer clients on the basis of a counselor's "sincerely held religious beliefs" (Canady, 2016). This law is in direct violation of the ACA *Code of Ethics* and fails to protect the welfare of the clients (Yep, 2016). Therefore, the ACA and Tennessee Counseling Association employed both social justice advocacy and professional advocacy opposed to this bill. During the campaign against the SB 1566/HB 1840, organizations advocated for the profession by educating the public about the counseling profession and promoting self-governance.

For the purpose of this dissertation, I define advocacy as a process to achieve a goal that empowers the counseling community and its clients. The goal can be directed toward

professional practice (e.g., licensure portability, fair marketplace recognition); social justice aimed at reducing oppression, discrimination, and barriers that impede the growth of clients, organizations, and communities; or a combination of both types. To achieve these goals, professional counselors can use *Advocacy Competencies* (Lewis et al., 2002) as a guide through the process of professional and/or social justice advocacy. In the next section, I explore two primary sets of advocacy and social justice competencies endorsed by ACA.

Advocacy Competencies

Due to an increased call to action toward advocacy (ACA, 2014) advocacy competencies have become a guide for counselors who wish to become advocates (Ratts, Toporek, & House, 2010). In this section, I explore the *Multicultural and Social Justice Counseling Competencies* (MSJCC) (Ratts et al., 2016) and the *Advocacy Competencies*. I utilize the *Advocacy Competencies* (Lewis et al., 2002) to structure a review of the literature regarding advocacy in counseling.

Multicultural and Social Justice Counseling Competencies (MSJCC)

Designed by Ratts et al. (2016), the MSJCC are the newest competencies endorsed by the ACA. These competencies were created by an Association for Multicultural Counseling and Development (AMCD) task force and were intended to update initial multicultural counseling competencies provided by Sue, Arredondo, and McDavis (1992).

The MSJCC aimed to address intersectionality of culture and identity and expand roles “of professional counselors to include individual counseling and social justice advocacy” (Ratts et al., 2016, p. 29). The MSJCC are intended to increase counselor awareness about oppression and privilege, intersecting identities, and biases and prejudice at multiple levels (Ratts et al., 2016).

The MSJCC are divided into four quadrants (see figure 1): 1) counselor self-awareness, 2) client worldview, 3) the counseling relationship, and 4) counseling and advocacy interventions. In each quadrant, counselors are asked to explore attitudes and beliefs, knowledge, skills, and action needed. Ratts et al. (2016) further outlined types of actions within each quadrant that promote social justice advocacy and increase awareness of self and others.

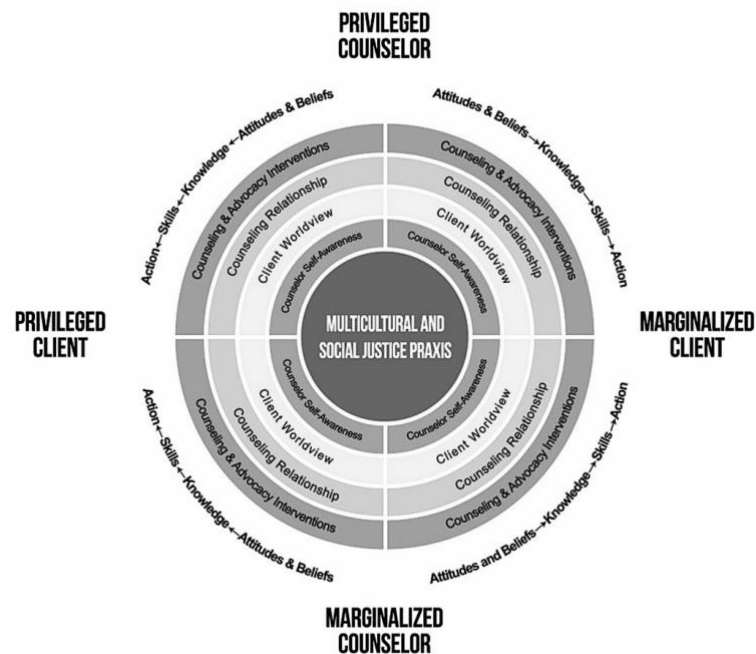


Figure 1. Multicultural and Social Justice Counseling Competencies (Ratts et al., 2016, p. 35).

The MSJCCs are grounded in multicultural and social justice literature including work by Hook, Davis, Owen, Worthington, and Utsey (2013), Nassar-McMillan (2014), Ratts, D'Andrea, and Arredondo (2004), and Singh and Salazar (2010) (Ratts et al., 2016). At the time of this writing, the MSJCC had been cited in 32 published journal articles in the first year alone. The MSJCC are oriented toward social justice by design, and they have a distinct client focus. Thus,

the competencies provide little guidance for counselors seeking to engage in professional advocacy.

Advocacy Competencies

Lewis et al. (2002) proposed *Advocacy Competencies* which the ACA adopted in 2003. The *Advocacy Competencies* were an initiative of former ACA President Jane Goodman who assigned a task force to develop competencies that focused on hands-on, action-oriented behaviors for engaging in professional and social justice advocacy (Toporek, Lewis, & Crethar, 2009). Over 290 journal articles and books have cited these competencies, and the ACA continues to endorse these landmark competencies as accepted practice for professional and social justice advocacy. They are divided into two dimensions: level of involvement and setting (see figure 2) (Lewis et al., 2002).

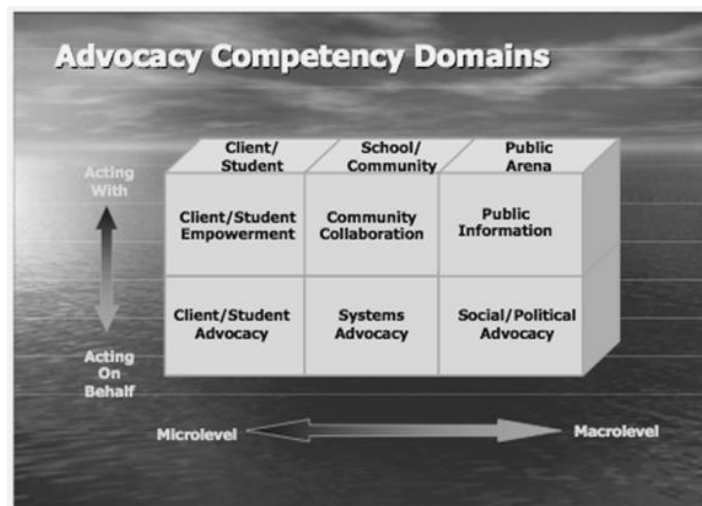


Figure 2. *Advocacy Competencies* domains (Lewis et al., 2002, p. 1)

Level of involvement includes "acting with" and/or "acting on behalf," and setting includes client/student, school community, and public arena (Lewis et al., 2002). Level of

involvement and settings combine to form six domains: 1) client/student empowerment, 2) client/student advocacy, 3) community collaboration, 4) systems advocacy, 5) public information, and 6) social/political advocacy. Lewis et al. (2002) provided detailed suggestions of counselor behaviors consistent with each domain.

The *Advocacy Competencies* addressed both professional and social justice advocacy and provided a holistic view of the roles of the “counselor-advocate” (Toporek, 2009, p. 87).

Utilizing the framework set by Lewis et al. (2002), I organize this literature review based on levels of intervention and, as appropriate, specific domains.

Individual level of intervention. At an individual level, counselors must recognize social and political obstacles and oppressive practices that affect clients’ growth (Ratts & Hutchins, 2009). Counselors who use one-on-one interventions empower clients toward change, advocate to remove obstacles, and increase access to resources (Lewis et al., 2002; Ratts & Hutchins, 2009). The type of advocacy intended at the individual level of intervention is social justice advocacy. Examples of research regarding the individual level of intervention include counselors’ work with mixed immigrant status families (Brabeck, Sibley, Taubin, & Murcia, 2016), rural communities (Bradley, Werth Jr, & Hastings, 2012), and high school students (Wright, 2016). The literature also includes attention to specific techniques for individual intervention including the use of Photovoice to target empowerment and advocacy (Sackett & Jenkins, 2015).

Lewis et al. (2002) divided the individual level of intervention in the *Advocacy Competencies* (Lewis et al., 2002) into two domains: client/student empowerment and client/student advocacy. In the following section, I explore relevant literature in each domain.

Client/student empowerment. Within this domain, counselor advocacy efforts are “taken in collaboration with the client/student” in a manner that is culturally and developmentally appropriate (Ratts et al., 2010, p. 14). Counselors use client and student strengths and resources to empower them toward desired actions and educate them about the influence of “social, political, economic and cultural factors” on their wellbeing (Ratts et al., 2010, p. 14).

Lewis et al. outlined the following client/student empowerment interventions,

1. Identify strengths and resources of clients and students.
2. Identify the social, political, economic, and cultural factors that affect the client/student.
3. Recognize the signs indicating that an individual’s behaviors and concerns reflect responses to systemic or internalized oppression.
4. At an appropriate development level, help the individual identify the external barriers that affect his or her development.
5. Train students and clients in self-advocacy skills.
6. Help students and clients develop self-advocacy action plans.
7. Assist students and clients in carrying out action plans. (2002, p. 1)

Client/student empowerment is the most discussed area of advocacy in the professional literature. Scholars have researched the needs and strengths of diverse populations, including preferred treatment practices to enhance resilience and empowerment (Lewis et al., 2002).

Literature that uses the *Advocacy Competencies* (Lewis et al., 2002) for client/student empowerment is divided into two realms: conceptual and empirical. Conceptual articles offer “new theoretical perspectives or integrate existing theoretical views, address innovative—new or adapted—procedures or techniques” (Watts 2011, p. 306). Empirical articles involve quantitative or qualitative research “originating in or based on observation or experience” (Empirical, n.d.). To further explore the client/student empowerment literature, I divide the research into conceptual and empirical literature.

Conceptual literature in the client/student empowerment domain is the most prevalent type of literature about advocacy. Conceptual articles in this domain present an overview of needs, barriers, and strengths of selected populations and offer culturally appropriate interventions. Authors have explored client/student empowerment with a wide variety of populations including children with autism (Ennis-Cole, Durodoye, & Harris, 2013); children living in poverty (Tate, Lopez, Fox, Love, & McKinney, 2014); low income women (Pugach & Goodman, 2015); women with prenatal depression (Choate & Gintner, 2011); gay men with histories of chemical abuse and dependency (Hutchins, 2015); lesbian, gay, bisexual, transgender, queer, questioning (LGBTQQ) clients (Estrada & Rutter, 2007; Gonzalez & McNulty, 2010; Singh & Burnes, 2010; Singh & Moss, 2016); undocumented Latinx immigrants (Herbst, Bernal, Terry, & Lewis, 2016); Latino men (Clark, Ponjuan, Orrock, Wilson, & Flores, 2013); and Muslim Americans (Ibrahim & Dykeman, 2011).

Another body of conceptual literature is focused on client/student empowerment in special settings such as group work (Hays, Arredondo, Gladding, & Toporek, 2010; Okech, Pimpleton, Vannatta, & Champe, 2015; Ratts, Anthony, & Santos, 2010), group work for crisis intervention (West-Olatunji, Henesy, & Varney, 2015), and school based interventions (Barrett, Lester, & Durham, 2011; Johnson, Ziomek-Daigle, Haskins, & Paisley, 2017; Moss, & Singh, 2015). Literature in school-based interventions includes attention to child maltreatment (Barrett et al., 2011), students of color (Moss & Singh, 2015), and ESL students (Johnson, Ziomek-Daigle, Haskins, & Paisley, 2017). Lastly Grothaus, McAuliffe, and Craigen (2012) proposed use of a strength-based counseling model to fuel client/student empowerment.

In all, conceptual literature in the client/student empowerment domain covers a variety of issues, populations, and settings. The cited sources provide guidance to counselors who wish to be effective advocates for client/student empowerment.

Empirical literature regarding client/student empowerment is less frequent than conceptual literature. Similar to conceptual articles, research found in the client/student empowerment domain focused on identifying needs, barriers, and strengths of a selected population, often by interviewing or surveying members of the population. In general, authors used results from the interviews or surveys to suggest appropriate empowerment interventions. Literature within this domain includes qualitative studies of needs of LGBTQQ clients (Burnes, Dexter, Richmond, Singh, & Cherrington, 2016; González, 2016; 2017; Johnson, Singh, & Gonzalez, 2014; Singh, Hays, & Watson, 2011; Singh, Meng, & Hansen, 2014), lesbians of African ancestry (Gibson, Schlosser, & Brockmurray, 2007), African American women who have survived child sexual abuse (Singh, Garnett, & Williams, 2013), African American men in urban schools (Tucker, Dixon, & Griddine, 2010), African American and Latino men college students (Cerezo, Lyda, Enriquez, Beristianos, & Connor, 2015), underrepresented high school students (Schaeffer, Akos, & Barrow, 2010), international adoptees in schools (Lancaster & Constantin, 2014), and career counseling clients (Fickling, 2016).

Client/student empowerment empirical literature empowers clients and students by giving them the opportunity to identify strengths, limitations, and preferred treatment practices. In addition, these empirical studies may help counselors who work with these specific populations to be effective client/student empowerment advocates.

Client/student advocacy. Counselors also conduct advocacy on behalf of clients. Counselors may use this domain of advocacy when counselors have access to resources clients

and students do not have (Ratts et al., 2010). This goal of this type of advocacy is to increase clients/students' access to needed resources (Lewis et al., 2002; Ratts et al., 2010).

Lewis et al. (2002) outlined the following client/student advocacy interventions:

8. Negotiate relevant services and education systems on behalf of clients and students.
9. Help clients and students gain access to needed resources.
10. Identify barriers to the well-being of individuals and vulnerable groups.
11. Develop an initial plan of action for confronting these barriers.
12. Identify potential allies for confronting the barriers.
13. Carry out the plan of action. (p. 1)

Literature in the client/student advocacy domain is almost all conceptual (e.g., Bradley et al., 2012; Brubaker, Harper, & Singh, 2011; Dickey & Singh, 2017; Ibrahim & Dykeman, 2011), although I located a few empirical articles (e.g., Singh, Garnett, & Williams, 2013; Nilsson, Schale, & Khamphakdy-Brown, 2011). The literature focuses how to increase support and resource access to various populations. The general consensus is that counselors need to provide culturally relevant strategies adjusted to needs of diverse clientele (Bradley et al., 2012; Brubaker et al., 2011; Dickey & Singh, 2017; Ibrahim & Dykeman, 2011; Singh et al., 2013; Sue & Sue, 2016).

Research inside this domain promotes including family services for children with autism (Ennis-cole, Durodoye, & Harris, 2013), supporting families of LGBTQ youth (Luke & Goodrich, 2015), using group work to increase diversity dialog and inclusion (Ratts et al., 2010; Singh, Merchant, Skudrzyk, & Ingene, 2012), and reducing aggression toward LGBTQ individuals (Singh, 2013). Other research studies focus on implementing services in schools to increase support for LGBTQ students (Cerezo & Bergfeld, 2013; Beck, Rausch, & Wood, 2014; González, 2016; Singh & Harper, 2013), rural communities (Bradley et al., 2012), students

with disabilities (Mitcham, Agahe Portman, & Afi Dean, 2009), and international adoptees (Lancaster & Constantin, 2014).

Multiple authors have urged counselors to use leadership strategies to build bridges between services and clients, including African American women (Singh, Garnett, & Williams, 2013), LGBTQQ clients (Brubaker, Harper, & Singh, 2011; Dickey & Singh, 2017), and Muslim Americans (Ibrahim & Dykeman, 2011). The literature also includes attention to navigating difficult systems including child welfare (Fawley-King, 2010), health care (Choate & Gintner, 2011), and refugee and immigration processes (Lancaster & Constantin, 2014; Nilsson, Schale, & Khamphakdy-Brown, 2011).

The cited client/student advocacy research aimed to identify ways to advocate on behalf of clients to increase access to necessary resources. Literature inside this domain may guide counselors when advocating for diverse populations in a variety of settings.

Overall, literature in the individual level of intervention provided a holistic summary of needs, strengths, and interventions for diverse clients. Counselors who wish to act upon social justice advocacy using client empowerment and advocacy have a plethora of resources to inform their actions. In the next section, I cover the next level of intervention guided by the *Advocacy Competencies*.

School and community level of intervention. At a school and community level, counselors work with and on behalf of schools, communities, and organizations to advocate for needs and remove systemic barriers that impact clients that use their services (Marbley, Malott, Flaherty, & Frederick, 2011). Counselors using community and systemic interventions empower the community toward change, advocate to remove obstacles, and increase access to resources (Lewis et al., 2002; Ratts & Hutchins, 2009). The type of advocacy intended at the school and

community level of intervention can comprise social justice and/or professional advocacy.

Examples of school and community intervention research include community prevention of HIV (Tenkorang & Maticka-Tyndale, 2014), homelessness (Miller & Bourgeois, 2013), and adolescent alcohol use (Bendtsen, Damsgaard, Tolstrup, Ersbøll, & Holstein, 2013). In addition, authors have researched community interventions to reduce illness in international communities (Park, Lee, Gittelsohn, Nkala, & Choi, 2015) and address community violence (Aisenberg & Herrenkohl, 2008; Ozer, Lavi, Douglas, & Wolf, 2015; Reilly, 2014).

Lewis et al. (2002) divided the school and community level of intervention into two domains: community collaboration and client/student advocacy. In the following section, I explore relevant literature in each domain.

Community collaboration. Inside domain, counselors work with and for community organizations or schools to “identify issues of oppression or systemic barriers faced within those entities” (Ratts et al., 2010, p. 15). Counselors are active participants and collaborators in providing training, research, and action plans that support community organizations and schools (Lewis et al., 2002; Ratts et al., 2010). In addition, counselors use the community’s strengths and resources to promote change and empower organizations and schools (Lewis et al., 2002; Ratts et al., 2010). The goal of community collaboration is to develop or obtain access to resources that foster autonomy (Ratts et al., 2010).

Lewis et al. (2002) outlined the following community collaboration interventions:

14. Identify environmental factors that impinge upon students’ and clients’ development.
15. Alert community or school groups with common concerns related to the issue.
16. Develop alliances with groups working for change.
17. Use effective listening skills to gain understanding of the group’s goals.
18. Identify the strengths and resources that the

group members bring to the process of systemic change. 19. Communicate recognition of and respect for these strengths and resources. 20. Identify and offer the skills that the counselor can bring to the collaboration. 21. Assess the effect of counselor's interaction with the community. (p. 2)

Literature in this domain focuses on partnerships with schools and community agencies to promote clients' growth. To further explore the community collaboration literature, I divide the research into conceptual and empirical literature.

Conceptual articles in this domain present an overview of the needs, barriers, and strengths of selected communities and propose a partnership plan to assist clients. Authors have explored community collaboration with allies of transgender youth (Gonzalez & McNulty, 2010; Harper & Singh, 2014), legal clinics (Malott & Knoper, 2012), and community agencies that serve refugees (Kuo & Arcuri, 2014). Scholars have also proposed counselor-school collaboration to promote culturally responsive climate for diverse students (Schulz, Hurt, & Lindo, 2014), students of color (Curry & Hayes, 2009), African American students (Adkison-Bradley, Johnson, Rawls, & Plunkett, 2006; Washington, 2010), and Latino immigrant families (Gonzalez, Borders, Hines, Villalba, & Henderson, 2013). Additionally, Bryan and Holcomb-McCoy (2007) built a School-Family-Community model to guide school counselors when partnering with families and surrounding communities. Bryan and Henry (2012), Griffin and Steen (2010), Mitchell and Bryan (2007), and Suárez-Orozco, Onaga, and Lardemelle (2010) further developed the School-Family-Community model and application to school counseling.

Conceptual literature in community collaboration has a strong emphasis on school-community partnerships. I found limited conceptual articles that address community partnerships for clinical mental health counselors. At times, authors discussed community collaboration as an

implication for articles in which the primary focus was on individual level advocacy (e.g., Bradley et al., 2012; Choate & Gintner, 2011; Clark et al., 2013; Luke & Goodrich, 2015; Williams & Portman, 2014).

Similar to conceptual articles, the empirical research found in the community collaboration domain focused on identifying needs, barriers, and strengths of schools and communities. Researchers often interviewed or surveyed members of schools and communities. Several articles focused on implementing and evaluating a community collaboration intervention.

Literature addressing schools and communities included qualitative research on community collaboration for rehabilitation counselors (Bezyak, Gilbert, Walker, & Trice, 2012), school counselors (Gibbons, Diambra, & Buchanan, 2010), crisis counselors (Vierthaler, 2008), and interdisciplinary community collaboration (Bayne-Smith, Mizrahi, & Garcia, 2008; Mizrahi, Bayne-Smith, & Garcia, 2008). Qualitative research regarding implementation and evaluation of community collaboration intervention included service learning course partnerships with refugee agencies (Midget & Dumas, 2016; Nilsson et al., 2011) and homeless shelters (Dipeolu, Storlie, Hargrave, & Cook, 2015). In addition, Murray and Crowe (2016) implemented the *Triumph Campaign* to end stigma surrounding intimate partner violence (IPV) by partnering with community agencies and promoting community education about IPV.

The empirical literature on community collaboration varied from conceptual literature in that it covered a wide spread of issues, types of counseling, and types of communities. However, there appeared to be a lack of quantitative empirical research about community collaboration.

Systems advocacy. Counselors employ systems advocacy when they work on behalf of community organizations and schools (Ratts et al., 2010). Ideally, systems advocacy is employed

when individuals inside the community do not have access to needed resources or power to implement change (Ratts et al., 2010). The ultimate goal of systems advocacy is to develop strategies that reduce barriers for community members who are seeking resources (Lewis et al., 2002). Counselor advocacy requires action to propel changes in organizational policy or procedures that limit access to such resources (Ratts et al., 2010).

Lewis et al. (2002) outlined the following systems advocacy interventions:

22. Identify environmental factors impinging on students' or clients' development 23. Provide and interpret data to show the urgency for change. 24. In collaboration with other stakeholders, develop a vision to guide change. 25. Analyze the sources of political power and social influence within the system. 26. Develop a step-by-step plan for implementing the change process. 27. Develop a plan for dealing with probable responses to change. 28. Recognize and deal with resistance. 29. Assess the effect of counselor's advocacy efforts on the system and constituents. (p. 2)

According to Lopez-Baez and Paylo (2009), systems advocacy builds on the prior domain of community collaboration because counselors take a leadership role to address systemic issues on behalf of schools and community organizations. Literature on systems advocacy includes holistic conceptual applications of systems advocacy (e.g., Bemak & Chi-Ying Chung, 2008; Lopez-Baez & Paylo, 2009; Ratts, 2009; Toporek et al., 2009) as well as pedagogical interventions focused on systems advocacy (e.g., Decker, Manis, & Paylo, 2016; Journal et al., 2014; Kuo & Arcuri, 2014; Luu & Inman, 2017; Toporek & Worthington, 2014).

Some authors wrote conceptual models of systems advocacy for specific communities. White, Lloyd Simpson, Gonda, Ravesloot, and Coble (2010) built a theoretical model for counselors to help individuals in independent living centers to fully participate in the community.

Gonzalez and McNulty (2010) proposed strategies for school counselors to advocate on behalf of transgender students by partnering with peers, parents, school staff, and community members. Similarly, Singh and Burnes (2010) proposed strategies to advocate on behalf of transgender clients by developing a transgender-positive counseling environment. Ko et al. (2008) and Osofsky, Rovaris, Hammer, Dickson, Freeman, and Aucoin (2004) presented models of partnerships between mental health and law enforcement as a method for advocating on behalf of at-risk-communities. Lastly, Herbert and Bromfield (2015) created a child advocacy model for sexual assault survivors.

Several authors also presented systems advocacy as an implication in articles focused on another domain of advocacy. These authors presented systems advocacy as a type of intervention for school counselors (e.g., Barrett et al., 2011), career counselors (e.g., Fickling, 2016), rehabilitation counselors (e.g., Waldmann & Blackwell, 2010), rural communities (e.g., Bradley et al., 2012), women with prenatal depression (e.g., Choate & Gintner, 2011) and LGBTQ clients (e.g., Gonzalez, 2017; Luke & Goodrich, 2015).

The literature on systems advocacy is primarily conceptual. Cited articles focused on how to implement systems advocacy holistically in one's role as a professional counselor or counselor educator. However, I found a lack of empirical research on systemic advocacy intervention, limiting resources available for counselor advocates who wish to do systems advocacy.

In summary, literature in school/community level of intervention is limited, school counseling and social justice centered, and primarily conceptual. I did not find professional advocacy literature in this level of intervention. Counselors who wish to act upon school/community professional advocacy and those in mental health settings have limited

empirical resources to guide their endeavors. In the next section, I cover the third level of intervention guided by the *Advocacy Competencies*.

Public level of intervention. At a public level, counselors work with and on behalf schools, communities, and organizations to advocate for their needs and remove macro-level barriers (i.e., regional, national, or international). Counselors who advocate at the public level must understand that they are representing groups for which they are advocate and must maintain open lines of communication “to ensure that their counseling efforts are consistent with the needs of the group” (Lee & Rogers, 2008, p. 87). Advocacy at the public level of intervention can be either social justice advocacy, professional advocacy, or a combination of both. Lee and Rogers (2008), Toporek et al. (2009), Toporek (2006), and Ratts et al. (2009) offered examples of action steps for public level advocacy. Examples of public level advocacy include socioeconomic justice (Greenleaf, Ratts, & Song, 2016), legal advocacy for immigrant families (Brabeck et al., 2016; Paat, 2013), and public advocacy for LGBTQQ individuals (Barrett, 2011).

Lewis et al. (2002) divided the public level of intervention into two domains: public information and social/political advocacy. In the following section, I explore relevant literature in each domain.

Public information. Inside this domain, counselors work with community organizations or schools as correspondents who raise awareness about external barriers that affect the community (Ratts et al., 2010). The role of the counselor advocate is that of an active communicator between community organizations or schools and the public at large (Lewis et al., 2002; Ratts et al., 2010).

Lewis et al. (2002) outlined the following public information interventions:

30. Recognize the impact of oppression and other barriers to healthy development. 31. Identify environmental factors that are protective of healthy development. 32. Prepare written and multi-media materials that provide clear explanations of the role of specific environmental factors in human development. 33. Communicate information in ways that are ethical and appropriate for the target population. 34. Disseminate information through a variety of media. 35. Identify and collaborate with other professionals who are involved in disseminating public information. 36. Assess the influence of public information efforts undertaken by the counselor. (p. 3)

It is important to note that all research cited in earlier domains may be considered acts of public information advocacy. All authors addressed barriers, strengths, and resources of selected communities, and they disseminated information through professional journals. The dissemination of information through journals allows counselors to inform the general public, counseling programs, and organizations about new research findings. Publication information also educates counselors regarding advocacy strategies that directly affect communities, clients, and students. In this way, these works, fulfill steps for public information advocacy (Lewis et al., 2002). For the purpose of this literature review, I focus on research that emphasizes application of public information advocacy.

Cited in community collaboration advocacy, Murray and Crowe (2016) also applied public information advocacy into their *Triumph Campaign* to educate the community about intimate partner violence (IPV). The authors implemented educational blogs and posts through social media to increase awareness and reduce stigma about intimate partner violence. The authors outlined step-by-step actions under each advocacy domain to be followed by others who may want to implement a similar campaign. The *Triumph Campaign* also later developed a *See*

the Triumph Survivor Advocacy Training Program (Kelly, Murray, & Crowe, 2017) designed to educate survivors to be community advocates. Authors do not provide evaluation or empirical data to validate the program's effectiveness, however, they designed the program based on prior research including a survey (Murray, Crowe, & Overstreet, 2015) and a phenomenological study (Flasch, Murray, & Crowe, 2015) with survivors of IPV.

Cisneros and Lopez (2016) also implemented public information through an education program, *DREAMzone*, located in Arizona. *DREAMzone* was designed as a four-hour workshop that informed counselors and the community regarding how to work with undocumented students. The workshop aimed to increase self-awareness, promote knowledge, and provide skills and resources for counselors who work with undocumented students. The authors outlined a curriculum to be followed by others who wanted to implement a similar program; however, they did not provide evaluation results or empirical data to validate program effectiveness.

Schaefer, Cates, Malott, Conwill, and Daniels (2011) conducted a phenomenological study of town hall participants ($n = 50$) and used resulting data to develop a community intervention focused on the promotion social justice advocacy. The authors presented findings of town hall participant requests; however, the authors did not present further information about details of the plan, implementation, or evaluation.

As with other domains, several authors presented public information advocacy as an implication in articles for which the primary focus was another domain of advocacy. Bradley et al. (2008) suggested partnering with local agencies/schools to provide psychoeducation regarding the needs of rural communities. Choate and Gintner (2011) proposed using training programs to inform the public about symptoms of prenatal depression, best treatment practices, and referral sources for counseling services. Finally, Griffin and Steen (2010) suggested that

rural school counselors educate the public about the low levels of education in rural communities.

Social/political advocacy. In social/political advocacy, counselors address, communicate, and act upon public policy and legislation that directly harms populations they serve (Ratts et al., 2010). In addition, counselors work to promote legislation that supports the populations they serve. Counselors who act on social/political advocacy represent their clients and community in the macro arena (Lewis et al., 2002; Ratts et al., 2010).

Lewis et al. (2002) outlined the following social/political advocacy interventions:

37. Distinguish those problems that can best be resolved through social/political action.

38. Identify the appropriate mechanisms and avenues for addressing these problems. 39.

Seek out and join with potential allies. 40. Support existing alliances for change. 41. With

allies, prepare convincing data and rationales for change. 42. With allies, lobby

legislators and other policy makers. 43. Maintain open dialogue with communities and

clients to ensure that the social/political advocacy is consistent with the initial goals. (p.

3)

The social/political domain is closest to the area of focus for this study. Therefore, in the following section, I review work in greater depth and with special attention to limitations for counselor advocate practice.

Literature within the social/political advocacy domain is scarce. The most prominent type of literature pertaining to social/political advocacy involves conceptual “how to” guides. Lee and Rogers (2008) outlined strategies for “creating change in the public arena,” including legislative policy related to professional counseling. The authors disclosed tips for interacting with the media, creating inter-professional alliances, lobbying, and acting upon social/political advocacy.

In contrast, Lewis (2011), Ratts, DeKruyf, and Chen-Hayes (2007), and Stewart, Semivan, and Schwartz (2009) all used social/political advocacy steps outlined by Lewis et al. (2002) as an essential piece to social justice advocacy. Lewis (2011) integrated these steps in a community counseling model, Ratts et al. (2007) as a framework for professional school counselors, and Stewart et al. (2009) as a framework for psychotherapists. All authors focused only on social justice advocacy, providing little guidance for professional advocacy.

Several authors presented public information advocacy as an implication in articles for which the primary focus was another domain of advocacy. For example, Tate, Lopez, Fox, Love, and McKinney (2014) suggested advocating for policies that would lead insurance companies to extend session length and expand permitted services for children with severe emotional disturbances. Singh et al. (2013) argued that legislative advocacy could prevent further stigmatization and oppression for survivors of sexual abuse. Lastly, Bradley et al. (2012) proposed social/political advocacy as a method for promoting services and resources in rural communities.

Although the literature is limited, the ACA offered online resources for counselors who wish to act upon social/political advocacy. Some resources include: 1) effective advocacy with members of Congress by the ACA office of public policy and legislation; 2) federal policies affecting counselors: how can they be changed?; 3) federal information resources for professional counselors; 4) communicating with Congress: lessons from recent research; and 5) communicating with Congress: why do it? and how? (ACA, 2017). In addition, the ACA included a “take action” feature on their website to help counselors advocate for important issues via pre-filled letters that are ready to send to elected officials (ACA, 2007).

CSI (2017) also offered professional advocacy guidance and resources on their website. CSI resources divided advocacy into six themes: counselor education, intra-professional relations, marketplace recognition, inter-professional issues, research, and prevention/wellness. CSI identified these six themes in 1998 as top priorities for professional advocacy. In conjunction with other organizations such as ACA, CSI outlined their own goals, objectives to achieve goals, activities to support goals, responsible parties, assets, obstacles, resources needed, association actions, and timeline for each theme. Counselors who wish to act upon professional advocacy can use CSI's plan of action as a guideline.

Overall, literature in public level of intervention is extremely limited, especially on professional advocacy. The literature pays some attention to public information; however, literature focused on social/political advocacy in counseling is almost non-existent. In addition, I only found literature that was conceptual in nature. Counselors who wish to act upon this level of advocacy have limited resources to guide their endeavors. Due to the scarcity of social/political advocacy literature in counseling and the focus on this domain within this dissertation, I explore articles outside of the counseling profession as examples of social/political advocacy.

Social/political advocacy in related mental health professions. Related mental health professions provide some resources to guide counselors in social/political professional advocacy. In this section, I will provide a sample of social work and nonprofit literature with special attention to implications and limitations for counselor leaders. I will end this section with a social/political advocacy model proposed by a law professor.

Social work. Literature regarding social/political advocacy is prevalent in the social work literature. According to the National Association of Social Workers (NASW), social workers need to be active in social/political advocacy (2017). In fact, the NASW *Code of Ethics* has a

standalone section dedicated to *Social and Political Action* that states, “social workers should be aware of the impact of the political arena on practice and should advocate for changes in policy and legislation to improve social conditions in order to meet basic human needs and promote social justice” (p. 22). Thus, the social/political advocacy role expected of social workers has propelled an extensive amount of literature focusing on social/political advocacy.

Trevithick (2012) proposed a similar model as the advocacy competencies by Lewis et al. (2002). Trevithick (2012) described that advocacy interventions can be targeted to three levels, micro (individual or family), meso (community), and macro (political). To address any level, Dalrymple and Boylan (2013) suggested four basic advocacy skills: assessment, planning, intervention, and evaluation. Assessment includes identifying the problem, what caused it, and why. Planning involves providing a comprehensive plan that details how, who, and why. Intervention is following up with the outlined plan. Lastly, evaluation uses the targeted group’s feedback to adjust services provided (Dalrymple & Boylan, 2013). Netting (2012) proposed the same steps (planning, implementing, monitoring, and evaluating) as a method for social/political or macro advocacy. Netting (2012) added social workers must be prepared to encounter resistance, even by groups for whom they are advocating, when planning, implementing, monitoring, and evaluating social/political advocacy plans.

Haynes and Mickelson (2010) argued that social workers have the skill, knowledge, and power to directly affect change at a macro level and thoroughly outlined how to implement this type of advocacy into their role. This resource includes attention to topics such as lobbying methods, building coalitions, providing candidate endorsements, capping management, and running for government to directly influence policy. Furthermore, Van Wormer, Kaplan, and Juby (2012) proposed that social/political advocacy can have an immense impact on clients of

social workers. Specifically, the authors encouraged this type of advocacy in drug courts, suggesting cost effective treatments versus imprisonment. In addition, the authors advised social workers to partner with the United Nations to advocate for human rights.

The literature in social work provides specific models and methods to affect policy and the public area. Similar to NASW, ACA also calls for social justice and professional advocacy from its members. Professional counselors may draw from the social work literature to build a framework to integrate social/political advocacy into their role and guide implementation.

Nonprofit. Another set of professional literature that can provide additional guidance is the nonprofit literature. According to the Council for Nonprofits, nonprofit organizations directly improve their communities. Thus, the council encourages organizations to be active in social/political advocacy (National Council of Nonprofits, 2017).

Casey (2011) researched non-profit actions in social/political advocacy and proposed a model with six levels of outcome (see figure 3): access, agenda, policy, output, impact, and new policy. Although, this model has not been empirically validated (Almog-Bar & Schmid, 2014), it outlines how nonprofits may target goals based on desired impact.

Levels of Outcome	Impact on policy
Access	The voices of previously excluded stakeholders are now heard
Agenda	Desired policy change is supported by powerful decision makers
Policy	Desired change is translated into new legislation or regulations
Output	New policy is implemented as proposed
Impact	New policy has intended consequence
Structural	New policy is now widely accepted as the new norm

Figure 3. Levels of Advocacy Outcomes (Casey, 2011, p. 19)

Almog-Bar and Schmid (2014) argued that nonprofit organizations should consider stage of development and components of proposed policy when developing advocacy strategies and outcomes. Schmid, Bar, and Nirel (2008) studied engagement in political advocacy among a sample of nonprofit organizations ($n = 96$). The authors found that nonprofit organizations' level of political engagement was moderate, and they reported a positive correlation between desire for advocacy and engagement in political activity ($r = .56, p < .01$). In addition, authors found that nonprofits dependent on local funding were less likely to act upon social/political advocacy compared to those who were not dependent on local funding. In all, Schmid et al. (2008) provided insight into motivations and limitations of social/political advocacy among nonprofit organizations.

The ACA, its divisions, and its regions are non-profit organizations. Therefore, the nonprofit literature can be an optimal resource for leaders of counseling organizations and advocates who partner with counseling organizations to do social/political advocacy. Almog-Bar & Schmid (2014) argued:

The key for these leaders is to understand what governmental bureaucracies want from nonprofits, build those capacities into the organization, and develop personal relationships with the policymakers who make the decisions affecting the nonprofit. (p. 20)

Law. Building capacities to act upon social/political advocacy might involve partnering or creating additional roles within or outside the organization. Feldblum (2003) created the six circle theory based on experiences advocating for *The Americans with Disabilities Act* (ADA). The six circle theory of advocacy contains six main characters for successful advocacy

(Feldblum, 2003): the strategist, the outreach manager, the legislative lawyer, the lobby manager, the communications director and the policy researcher.

Feldblum developed this theory (see figure 4) to guide legislative lawyers who were hired by advocacy agencies to represent their best interest. This theory involves legislative lawyers and includes other participants from various professions and backgrounds. The strategist organizes and manages the other five roles. The outreach manager is the connection to organizations and individuals in the community. The legislative lawyer investigates the legal implications of the policy, and at times suggests alternatives. The lobby manager is the “face” of the cause inside of the government. The communications director is the “face” of the cause to the media. Lastly, the policy researcher is the one in charge to provide the content and knowledge that directly or indirectly impacts the policy.

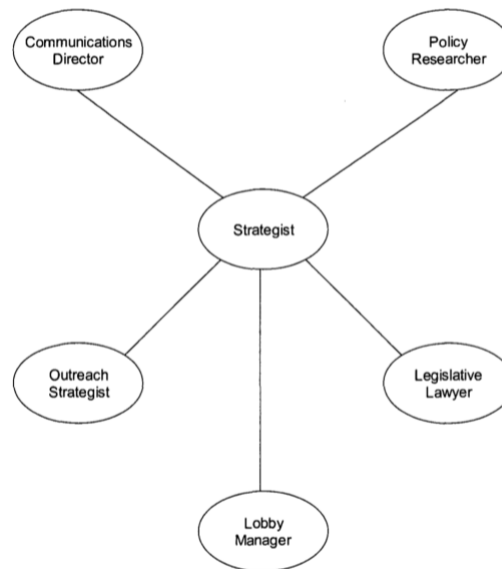


Figure 4. Six Circle Theory by Feldblum (2003, p. 792)

According to Feldblum (2003), the lobbyist, outreach strategist, and communications manager have been recognized as essential components of advocacy practice. In addition, the six circle theory of advocacy has been validated to be useful for legislative lawyers hired to do advocacy work (Karin & Runge, 2011; Shah, 2014). However, Shah (2014) noted that this model did not match grassroots organizations' structures and needs, and Goldberg (2015) argued that this theory was too complex and challenging to implement. In particular, the six circle theory was designed for lawyers and lobbyists who had extensive education about the legislative process, making this model difficult to apply for professional counselors and counselor educators who have limited or no legal training.

Conclusion

At the beginning of this chapter I defined advocacy as a process to achieve a goal. The goal can be directed toward professional practice or toward social justice. Throughout this literature review, I aimed to identify how authors focused their advocacy literature based on the targeted goal. In summary, inside of the six domains of *Advocacy Competencies* (Lewis et al., 2001), I found a total 35 articles that directly addressed client/student empowerment, 26 on client/student advocacy, 27 on community collaboration, 24 on systems advocacy, and 10 on public information. Although all articles from earlier domains qualified as public information advocacy ($n = 112$), only six articles focused on how professional counselors engage in social/political advocacy.

The current literature regarding advocacy places the bulk of the scholarly counseling knowledge around social justice advocacy at an individual level. In addition, the majority of articles were conceptually driven, with limited empirical research. Although other professions

have substantial resources that can guide advocacy practices, counselors have unique needs and professional roles that need to be addressed.

To better understand advocacy in the counseling profession, it is necessary to explore advocacy training in counselor education programs. In the next section, I review research on graduate-level advocacy training, including six pedagogical models focused on advocacy.

Advocacy Training in Counselor Education

Many counseling scholars have called for active infusion of advocacy strategies in counseling programs (Constantine, Hage, Kindaichi, & Bryant, 2007; Kiselica, 2004; Pieterse, Evans, Risner-Butner, Collins, & Mason, 2008; Toporek & Worthington, 2014). In this section, I will explore training recommendations for counselor education. I start with popular pedagogical models in counselor education that cover advocacy holistically. I end this section with training strategies found in the counseling literature. Throughout this section, I attend to applicability and limitations of models and strategies for preparing counselor advocates.

Models of Advocacy Training

I identified four models that provide direction for counselor educators who include advocacy in their pedagogy. In this section, I explore emancipatory communitarianism, liberation model, advocacy counseling paradigm, and the T.R.A.I.N.E.R model.

Emancipatory communitarianism (EC). Prilleltensky (1997) designed EC to combine liberation psychology (Freire, 1993) and communitarianism (Etzioni, 1991). Counselors practice critical consciousness, communal responsibility, and advocacy to promote equality in the community (Prilleltensky, 1997). EC has three central elements: values, assumptions, and practices. All elements are interconnected and influence each other.

Prilleltensky (1997) proposed a set of values to be acknowledged and applied to benefit the community. These values are: caring and compassion, self-determination, collaboration and democratic participation, human diversity, and distribute justice. Counselors must balance values and always choose actions that are best for the community.

EC uses knowledge and power to promote equality and justice (Prilleltensky, 1997). Counselors also need to be aware of assumptions regarding what a “good life” and “good society” looks like, as assumptions based on individual achievement and power can cause oppression. According to Prilleltensky, “good life” and “good society” must be rooted in cooperation and communal gains.

“The values and assumptions of psychologists are manifested in practice” (Prilleltensky, 1997, p. 524). To practice EC, counselors must define the problem with societal oppression and inequality in mind. Clients and helpers collaborate towards solving the problem. Helpers empower clients and act as social agents of change. Lastly, community needs and structures guide the type and time of intervention (Prilleltensky, 1997). Brubaker et al. (2010) suggested using EC to increase students’ critical consciousness by asking students to question assumptions, engage in self-exploration exercises, and question the use of interventions (including theory) as an individual or community approach.

Prilleltensky’s work (1997) has received over 400 citations across disciplines. Several professional counseling scholars have conceptually applied EC with diverse populations such as homeless clients (Brubaker, Garrett, Rivera, & Tate, 2010), LGBTQQ allies (Duhigg, Rostosky, Gray, & Wimsatt, 2010), career counseling in general (Bingham, 2011; Blustein, 2017; Solberg & Ali, 2017), and international communities (Watson, 2009). All authors applied EC as a social justice oriented advocacy practice.

Although EC is recognized in the counseling literature, I did not find empirical studies that applied EC as a form of advocacy training in counselor education or literature that applied EC for professional advocacy purposes. Together, this limits knowledge regarding how EC may be applied by counseling advocates.

Liberation model. Steele (2008) created a conceptual model based on constructivist theory and Paulo Freire's (1993) work, and the liberation model (see figure 5) serves as a delivery method for social justice advocacy. Steele (2008) applied the liberation model along with a social justice focused pedagogy aimed at community counseling, school counseling, and counseling psychology students. Through this model, counselor educators can help counselors-in-training become successful social justice advocates.

The Liberation Model: Phases, Purpose, Content, and Processes			
Phase	Purpose	Content	Process
Phase 1 Investigation, examination, and deconstruction of U.S. society	Investigation of dominant U.S. cultural and political ideas, values, and concepts	Books, newspaper articles, magazines, movies, television shows, photographs, or other pieces of art—especially works from popular culture	Classroom dialogue, discourse analysis, and journal writing
Phase 2 Investigation, examination, and deconstruction of counseling	Deconstruction or removal of the privilege conveyed in dominant knowledge in counseling literature and models	Literature from counseling journals, counseling theorists, professional organizations, accreditation bodies, and ethical standards	Classroom dialogue, discourse analysis, journal writing, and interviews
Phase 3 Interdisciplinary study of findings	Definition and study of a problem based on one or more of the themes discovered in Phases 1 and 2	Literature from relevant fields of study and interviews with individuals or groups who are directly affected by the issue under study	Group work, research, and report writing
Phase 4 Application	Development of a plan of action to address the problem under study	Report written in Phase 3 for the development of a plan of action for groups affected by the issue under study	Group work and oral presentation

Figure 5. The Liberation Model: Phases, Purpose, Content, and Process (Steele, 2008, p. 78)

The liberation model has four phases that build on each other (Steele, 2008). Phase one is dedicated to investigating current social and political issues. Phase two requires deconstruction of social and political issues and challenges previous misconceptions founded on privilege. Phase three involves study of current social and political issues through multiple disciplines. Lastly, phase four involves development of action plans that address selected social and political issues. Steele recommended that students submit weekly reflection journals, written reports on phase three, and final presentations on phase four.

Steele (2008) designed the liberation model to be implemented during an academic semester. Each phase does not have a required length of time. However, the author recommended that counselor educators dedicate equal time between phase one and phase two (Steele, 2008). The needs of the class, students, and the community delineate the goals and achievement of such goals (Steele, 2008).

Steele's (2008) model is a conceptual model and is not founded on empirical research. However, multiple authors (e.g., Brady-Amoon, Makhija, Dixit, & Dator, 2012; Brubaker, Puig, Reese, & Young, 2010; Estrada, 2015; Estrada, Poulsen, Cannon, & Wiggins, 2013; Steinfeldt, Foltz, & Stockton, 2014) have suggested partial or complete implementation of this model.

Brubaker et al. (2010) suggested the liberation model as a tool for the application of EC (Prilleltensky, 1997) within counseling theories courses. Brubaker et al. (2010) argued that the liberation model can be used to assist students to build community partnerships, feel empowered toward social justice advocacy action, and introduce a multicultural lens to be applied with traditional counseling theories.

Estrada (2015) proposed the use of the liberation model for multicultural counseling courses. The author argued that the model and other social justice oriented pedagogies lacked

clarity on instructor-student relationships. Therefore, Estrada (2015) proposed the use of Myers' (2008) teaching alliance to strengthen relationships between students and instructor while promoting social justice in the classroom.

Similarly, Estrada et al. (2013) recommended use of the liberation model for an orientation course for new counseling students. Estrada et al. (2013) argued that students enter counseling programs with prior misconceptions of privilege, oppression, and cultural diversity. By using the liberation model, counselor educators can address privilege and prepare students to be culturally competent counselors and social justice advocates.

Brady-Amoon et al. (2012) implemented parts of the liberation model in their "campus-based chapters of Counselors for Social Justice (CSJ) and Psychologists for Social Responsibility (PsySR)" (p. 85). Specifically, they proposed use of educational opportunities about social justice (phase one) and reflective practice proposed by Steele (2008) and other social justice pedagogical models (Brady-Amoon et al., 2012). Although not an empirical investigation, the authors reported that using reflective exercises about privilege and training about social justice increased student involvement in social justice advocacy for CSJ and PsySR chapters.

It is important to note that Brady-Amoon et al. (2012), Brubaker et al. (2010), Estrada (2015), and Estrada et al. (2013) did not recommend use of Steele's (2008) liberation model by itself. These authors paired the liberation model with other pedagogical models focused on multicultural training (D'Andrea & Daniels, 1991; 2010) and feminist pedagogy (Ancis & Ali, 2005; Brown, 1997; Brown & Perry, 2011); these models include educational and reflective components aimed at increasing awareness of privilege and oppression.

In contrast to prior authors who suggested partial application of the liberation model, Steinfeldt et al. (2014) proposed full implementation of the four phases for a psychoeducational

group to educate students about marginalization of American Indian communities. With the exception of phase three, each phase of the group mirrored phases proposed by Steele (2008). The authors suggested a synthesis of the “problem,” instead of engagement in interdisciplinary research. The proposed group was eight sessions long with two sessions per phase. The authors concluded that implementation of the liberation model in a group setting made group leaders social justice role models who educated others about issues of oppression and inequality. They concluded this conceptual piece by noting that the group process incentivized group members to act upon social justice advocacy.

Although this model is not empirically validated, authors of these five articles supported the liberation model as a useful approach for implementing social justice focused pedagogy. However, the liberation model seems to be limited to counselor education programs, lacking application for counseling leaders outside of educational settings and counseling advocates who wish to act upon professional advocacy.

Advocacy counseling paradigm. Closely related to the liberation model (Steele, 2008), Green, Mccollum, and Hays (2008) created the advocacy counseling paradigm as a social justice driven pedagogy. Green et al. (2008) based this model on the *Multicultural Counseling Competencies* (Arredondo, Toporek, Brown, Jones, Locke, Sanchez, & Stadler, 1996) and the *Advocacy Competencies* (Lewis et al., 2002). The advocacy counseling paradigm is an educational approach to social justice advocacy with its goal as the “reorientation to awareness, knowledge, and skills” (Green et al., 2008, p. 19). According to Green et al., successful advocacy has three prerequisites: awareness of injustice, knowledge to empower self and others, and skills to perform and teach others to advocate. Through their practices, advocates should be continuously informed by multicultural, advocacy, and ethical competencies.

Similar to the liberation model, the advocacy counseling paradigm is a conceptual method for counselor training. Although its foundation in the counseling and advocacy literature has limited empirical validation, Manis (2012) used the model to promote cultural competence and social justice advocacy among counselors-in-training, and Middleton, Ergüner-Tekinalp, Williams, Stadler, and Dow (2011) promoted racial identity development and multicultural counseling competencies for White counselors who worked with clients of color. Manis (2012) and Middleton et al. (2011) are conceptual articles.

Goodrich and Luke (2010) applied the advocacy counseling paradigm as a group intervention with school counselors-in-training ($n = 10$) who worked with LGBTQQ adolescents. Authors used several ethnographic research methods, including “process observer notes, trainees’ subjectivity journals, researchers’ memos, and participants’ journals” (p. 149) to understand experience of group participants. The authors found that using the advocacy counseling paradigm helped increase awareness of self and others, including knowledge about the needs and challenges of LGBTQQ students and skills related to group work and intervention for LGBTQQ students. The authors concluded that use of models, such as the advocacy counseling paradigm can fill gaps in education about diverse populations and address multicultural issues in counselor education.

The liberation model and the advocacy counseling paradigm are conceptual models that guide counselor educators to teach social justice advocacy to counselors-in-training. However, these models provide little guidance to counselors who want to perform action oriented professional and/or social justice advocacy outside of counselor preparation programs.

T.R.A.I.N.E.R model. Similar to the advocacy counseling paradigm, Hof, Dinsmore, Barber, Suhr, and Scofield (2009) created the T.R.A.I.N.E.R. model to guide social and

professional advocacy training using the *Advocacy Competencies* (Lewis et al., 2002) as a framework. The model is designed as an instructional group method, where counselor advocates learn how to advocate in their communities. T.R.A.I.N.E.R is an acronym for a seven-step method to (1) Targeting; (2) Responding; (3) Articulating; (4) Implementing; (5) Networking; (6) Evaluating; and (7) Retargeting (Hof et al., 2009). Each phase uses the *Advocacy Competencies* as a guideline for intervention.

In the targeting phase, group participants identify a problem, issue, or cause for which they want to advocate and identify conditions the group affected by the problem is experiencing. The identified issue will guide the point of entry into advocacy skills (e.g., individual/student, community/school, or public arena). Once the cause and level of advocacy are selected, participants use the *Advocacy Competencies* (Lewis et al., 2002) to frame their response. During the articulating phase, participants use steps identified in *responding* and plan the advocacy activity, including content and logistics of the event. Next, advocates *implement* the plan while adjusting to needs of the targeted group. During the *networking* phase, advocates create community partnerships to assist in implementation of the plan; advocates may also create relationships in the targeted group during the course of the advocacy event. Advocates then evaluate the event using pre/post-test or longitudinal studies. The last phase, *retargeting* involves reevaluating all previous steps and *retargeting* the event to adjust to unmet needs of the targeted group or community.

The authors implemented this model in national trainings, student-led organizations, and national organizations (Hof et al., 2009). Prior to introduction of this model, Hof, Scofield, and Dinsmore (2006) conducted a longitudinal study of individuals ($n = 40$) attempting to implement 56 advocacy plans utilizing the T.R.A.I.N.E.R model. The authors collected advocacy plans and

contacted participants after three months to inquire about plan completion. Using a Likert scale, participants rated their plan completion,

from 1 (not started) to 5 (complete), their perception of the importance of their advocacy goal from 1 (not at all important) to 5 (extremely important), and their perception of the benefit of their advocacy action from 1 (not at all beneficial) to 5 (extremely beneficial). (Dinsmore, 2006, p. 211)

Hoff et al. (2006) concluded that adopting the T.R.A.I.N.E.R model benefited completion or near completion of the advocacy plans ($M = 3.06$), and having set goals benefited plan implementation ($M = 3.84$). These results were strongest when goals were directed toward personal growth ($M = 3.36$). In addition, the authors found that participants placed higher importance on professional or institutional advocacy ($M = 4.39$) opposed to social advocacy.

Although there is no further empirical evidence for the T.R.A.I.N.E.R model, Kumar (2016) proposed the T.R.A.I.N.E.R model as a method of social justice advocacy for improving conditions of street vendors in India. This model mirrors advocacy skills suggested by Dalrymple and Boylan (2013) in the social work literature. Sweeney (2012) proposed similar steps towards advocacy suggesting the same first five steps and replacing retargeting with celebrating accomplishments. Sweeney (2012) further argued that advocacy practice is challenging and tiresome for counselors; celebration of even small achievements may help counselors avoid burnout.

In all, the T.R.A.I.N.E.R model has a potential to be applied to both professional and social justice advocacy. However, aside from Kumar's (2016) conceptual article, I found no further literature to support this model.

The featured pedagogical models of advocacy training highlight ways to teach advocacy to counselors-in-training or counseling advocates in the community. Although these models provide foundational knowledge, there is a continued gap between advocacy strategies as a concept, and advocacy in action, especially regarding professional advocacy. All proposed pedagogical models provide limited empirical evidence and rarely address professional advocacy. Consequently, knowledge regarding how counseling advocates are trained in professional advocacy is limited. To continue to explore advocacy training in counselor education, I explore specific advocacy training strategies.

Curricular Advocacy Applications

Hill, Harrawood, Vereen, and Doughty (2012) argued that counselor educators must infuse advocacy practices in counselor education curricula. The authors further argued that implementation of advocacy should include opportunities for self-reflection and experiential learning (Hill et al., 2012). In this section, I explore literature around those two areas related to curricular preparation for advocacy: self-reflection and experiential learning.

Self-reflection activities. Self-reflection activities increase counselor advocates' awareness about privilege, oppression, and individual-systems interactions (Hill et al., 2012). In advocacy, the goal for self-reflection exercises is to increase "advocacy consciousness" and promote advocacy action (Hill et al., p. 276).

The *Multicultural and Advocacy Dimensions model* (Ratts, 2011) is a conceptual model that address advocacy action by using self-reflection activities. Ratts proposed the use self-reflection questions in conjunction with the *Advocacy Competencies*. In this article, the author outlined each major domain with a reflection question. For example, in the social/political advocacy, Ratts suggested the following reflection questions,

what social, political, and economic conditions are influencing the client's presenting problem (s)? Would addressing the sociopolitical context help alleviate the client's presenting concern(s)? How might you alter oppressive sociopolitical conditions that hinder your client's development? (p. 33)

Although this instructional strategy has not been empirically validated, it can assist counselor educators in the training of advocacy. However, questions proposed by the author are oriented toward social justice advocacy. Ratts did not discuss professional advocacy or provide direction towards professional advocacy training.

Self-reflection activities increase counselor advocates' awareness about potential areas of advocacy (Hill et al., 2012). The activities and models presented in this section can become useful tools in counselor education. However, applying self-reflection activities alone might not increase advocacy activities. Students might need hands on experiences to understand advocacy competencies. Next, I explore literature regarding experiential activities and service learning related to advocacy.

Experiential activities. One common experiential activity in advocacy training is exposing students to service learning placements in communities of need. Dotson-Blake, Dotson, Glass, and Lilley (2010) published a conceptual article focused on implementation of a semester long service-learning project for school counseling students. Students partnered with school counselors in the community and planned a service initiative that targeted school needs. Students used the MEASURE tool while planning the service initiative. "MEASURE, stands for Mission, Element, Analyze, Stakeholders-Unite, Results and Educate" (Dotson-Blake et al., 2010, p. 11). The authors did not further explain components of the MEASURE tool. Prior to implementation, the authors educated students about key factors of successful implementation of service projects.

These key factors included, planning and developing the plan in collaboration with a community partner and support of stakeholders, necessity of detailed expectations, and developmental appropriateness. The authors concluded that implementation of service-learning projects increased school counselors' role awareness, opened systemic collaboration, and further developed their professional and advocacy identities.

Similarly, Toporek and Washington (2014) conceptualized application of service learning projects. Students involved in service learning conducted career and employment counseling at a homeless shelter. Before, during, and after the service learning projects, the authors encouraged students to engage in difficult dialogues about poverty, homelessness, and social justice advocacy. Students reported that participation in both service learning and challenging dialogues expanded their understanding of professional identity, promoted systemic collaborations, and assisted in development of social justice advocacy skills. They concluded that service learning projects were beneficial for the development of a counseling identity oriented toward social justice.

Bemak and Chung (2011) proposed inclusion of service learning activities alongside mentoring. The authors described implementation of *classroom without walls* initiative in their counselor education program. The *classroom without walls* initiative included three interventions involving crisis responses to a hurricane, wildfire, and earthquake. Students participated in pre-service training prior to each intervention and were supervised and mentored during the interventions.

Bemak and Chung (2011) gathered comments and insights of students during each intervention. The authors found that students who participated felt that “they were giving back to the community” (p. 216) and felt an increased passion for social justice advocacy. They

concluded that infusing social justice advocacy service learning activities is critical to the future of the profession because it can provide positive systemic changes for populations in need.

Jett and Delgado-Romero (2009) also studied service-learning program outcomes, using a qualitative case study design in which they interviewed instructors ($n = 2$), coordinators ($n = 3$), and alumni ($n = 7$) who participated in pre-practicum service-learning projects which required 20 to 30 hours of community service. Jett and Delgado-Romero found that participants who engaged in pre-practicum service-learning perceived growth in their professional development, deeper understanding, and expansion of their professional roles. These findings matched conceptualizations of service learning outcomes provided by Dotson-Blake et al. (2010) and Toporek and Washington (2014). The authors noted that participants did not mention social justice or social responsibility in their interviews, calling for further research about links between social responsibility and service learning.

Several authors have empirically validated Jett and Delgado-Romero's (2009) findings (e.g., Atici, 2015; Koch, Ross, Wendell, & Aleksandrova-Howell, 2014; Stewart-Sicking, Snodgrass, Pereira, Mutai, & Crews, 2013). However, similar to Bemak and Chung (2011), Dotson-Blake et al. (2010), and Toporek and Washington (2014), there is no discussion regarding integration of professional advocacy. These sources also involved limited exploration of advocacy strategies utilized during service learning opportunities.

Bjornestad, Mims, and Mims (2016) integrated both service learning and self-reflection opportunities in their group counseling course. Participants ($n = 14$) were placed in a low income high school to conduct psychoeducational group counseling sessions over a period of four weeks. Participants used journals as a method of self-reflection after each group session. The authors coded journals and class discussions using qualitative content analysis. They found that

participation in service learning and self-reflection activities increased participants' leadership skills, ability to integrate theory, understanding of therapeutic relationships, and self-efficacy. This study did not explore advocacy as an implication.

The literature in this section explored benefits of service learning and self-reflection activities for promotion of professional development. In addition, all authors found that curricular advocacy activities incentivized counseling students to perform social justice advocacy. However, none of the authors explored professional advocacy or social justice advocacy at a social/political level.

Summary of the Literature

In this chapter, I reviewed literature regarding advocacy and its diverse applications in professional counseling. Specifically, I focused on advocacy at individual, community, and public levels and reviewed literature regarding how counselor educators teach advocacy. While reviewing the literature I found two major themes. First, the vast majority of proposed models or tactics are conceptual in nature, restricting comprehension regarding how advocacy is being performed by counselors in the field. Second, literature focused primarily on individual and community interventions, limiting understanding about advocacy in the public arena, especially as it relates to professional social/political advocacy.

Dixon and Dew (2012) argued that social/political advocacy is essential for our profession and Brat, O'Hara, McGhee, and Chang (2016) called for counselor educators to infuse professional advocacy activities in their pedagogy. However, literature regarding social/political professional advocacy is almost non-existent.

As discussed in Chapter one, the counseling profession currently needs professional social/political advocacy. Counselors and the communities they serve are directly affected by

public policies that threaten well-being and limit fulfillment of counselors' roles and responsibilities. By practicing social/political advocacy, counselors can help political leaders understand critical roles counselors play in their communities. In addition, by practicing this type of advocacy, counseling advocates can influence legislation that benefits the counseling profession and its clients (Dixon & Dew, 2012).

Current practice is limited by a lack of empirical evidence to support professional counselors' engagement in professional advocacy. It is imperative to increase empirical knowledge about social/political advocacy so counselors may be better equipped with strategies for fully implementing this work. In Chapter Three, I propose methodology for a study regarding social/political advocacy choices and actions among professional counseling leaders.

Chapter 3: Methodology

In this chapter I describe a constructivist grounded theory (CGT) study focused on the process of social/political professional advocacy for counseling leaders. This chapter starts with an overview of qualitative methodology as an overarching framework and constructivist grounded theory (CGT) (Charmaz, 2014) as the primary methodology. Within the framework, I outline best practices for sampling, data collection, data analysis, and rigor. Next, I define the research questions for this study. I then outline methodology and procedures used in this study. I end this chapter by describing procedures for rigor I employed, provide my positionality statement, and describe limitations.

Grounded Theory Methodology

The research study requires examination of personal experiences of counseling leaders. Qualitative methods are optimal for addressing such experiences because “qualitative research provides a unique tool for studying what lies behind, or underpins, a decision, attitude, behaviour or other phenomena” (Ritchie & Lewis, 2003, p. 28). Qualitative research is a process that aims to address “why” questions to increase understanding about processes, meanings, and experiences about specific phenomena (Given, 2016). The objective of qualitative research is to explore, collect meaning, and make interpretations of data (Flick, 2009). Data can be collected through diverse methods such as interviews, observations, film, photographs, and written data (Holliday, 2016).

The use of GT started in the 1960s by Glaser and Strauss (1967). GT is one of the most dominant qualitative methodologies in social sciences, including the counseling profession (Patton, 2002). GT approaches “consist of systematic, yet flexible guidelines for collecting and

analyzing qualitative data to construct theories” (Charmaz, 2014, p. 1). Researchers using GT employ comparative methods to identify emergent themes and theories (Charmaz, 2014).

Today, there are three major types of GT, Classic GT by Glaser and Strauss (1967) and Glaser (1998), Systematic GT by Strauss and Corbin (1998), and CGT by Charmaz (2014). In the next section, I briefly cover Classic GT, Systematic GT, and CGT, with special attention to a rationale for using CGT in this study.

Types of Grounded Theory

Classic GT, Systematic GT, and CGT have more similarities than differences. All types use coding, constant comparison, theoretical sampling, and memoing during the research process. All GT types also follow a similar process of gathering, coding, comparing, categorizing, and thematizing data in order to find an emergent theory. In addition, all available data (e.g., field notes, interviews, observations, memoing) can be analyzed in the process of identifying an emerging theory (Glaser, 1978). Their main difference between types of GT lies in the type of paradigm, including views about research objectivity, use of literature, and rigidity versus flexibility in the analysis process.

Paradigm positionality is one of the main factors that sets the types of GT apart. Classic GT falls into a postpositivist paradigm, which claims researcher objectivity (Levers, 2013). Glaser (1978) acknowledged that researchers are not blank slates and bring their biases to the study; however, he argued that researchers can maintain objectivity while constructing the emerging theory. In addition, postpositivists claim the possibility of discovering partial truths wherein researchers can uncover generalizable knowledge via empirical validation.

In contrast, Systematic GT by Corbin and Strauss (1998) follows an interpretivist paradigm in which research is subjective and influenced by researchers’ beliefs, values, and

culture (Denzin & Lincoln, 2012). In addition, interpretivists believe that all knowledge is subjective, and objectivity is unattainable (Levers, 2013). The researcher could never discover knowledge that can be generalized. Therefore, Systematic GT aims to identify and retell experiences of the selected population.

Lastly, CGT by Charmaz (2014) fits with the constructionist paradigm. Levers (2013) argued that CGT has “aspects of both postpositivist and interpretivist paradigms” (p. 3-4) and reconciles important aspects of contrasting methodologies of Classic and Systematic GT. Charmaz (2014) argued that neither data nor its analysis is objective. The formation of theory is a co-construction between participants’ and researchers’ experience and understanding of the experience. Therefore, knowledge is constructed rather than discovered as Glaser (1978) claimed.

Another difference between GT types is use of literature and theoretical framework. Classic GT does not rely on theory, literature, or specific type of data. Glaser (1978) argued that reliance on an already constructed theory or past literature limits researchers’ ability to generate a new theory. Classic GT researchers use literature to support the emerging theory in later stages of the research process (Glaser, 1978). In contrast, researchers following Strauss and Corbin’s (1998) approach use literature in early stages to frame the study. Finally, researchers conducting CGT (Charmaz, 2014) use the literature review at the beginning of the research process, during data collection, and after data analysis. Charmaz argued that literature helps one “claim, locate, evaluate, and defend [your] position” (p. 305) and findings.

Lastly, the types of GT vary on the order of the analysis process. Researchers who use Classic GT (Glaser, 1978) and CGT (Charmaz, 2014) follow a systematic yet flexible data analysis process that involves alternating interactions between the data and analysis. Researchers

using systematic GT (Strauss & Corbin, 1998) follow basic concepts by Classic and CGT with an additional eleven step-by-step approach. Walker and Myrick (2006) argued that Systematic GT may “force” theoretical findings compared to Classic and CGT which focus on naturally emerging theories. In addition, Evans (2013) argued that Systematic GT is too complex and hard to follow, especially for novice researchers.

For the purpose of this study, I used CGT (Charmaz, 2014). I recognize that there in existence of multiple interpretations of professional advocacy and diverse types of counseling leaders and advocates. CGT assisted me to consider multiple perspectives and construct knowledge with participants. In addition, CGT allows researchers both flexibility and rigor while engaging in rich, in-depth descriptions of experiences and phenomena (Charmaz, 2014). In the next section, I outline CGT sampling; data collection, analysis and reporting; and rigor considerations.

Constructivist Grounded Theory Sampling

For CGT, sampling is designed to assist in development of the theory rather than for population representation (Charmaz, 2014). Therefore, sampling used in CGT is purposeful. In purposeful sampling, the researcher selects participants who are experiencing a particular phenomenon and can contribute rich data for the emerging theory (Morse, 2007). A type to purposeful sampling is criterion sampling (Morse, 2007). Criterion sampling identifies and selects participants the meet a predetermined criterion. Snowball sampling is often used alongside purposeful sampling. In snowball sampling, researchers request that identified participants suggest someone else who is appropriate for the study that meet the predetermined criterion (Bryant & Charmaz, 2007). Researchers using CGT also use theoretical sampling alongside purposeful, criterion, and snowball sampling. Theoretical sampling involves

intentionally selecting participants who can support emerging concepts and theory (Charmaz 2006; Morse, 2007).

After initial sampling is completed, the next step in CGT is data collection and analysis. In the next section, I outline CGT's data collection, analysis, and reporting procedures.

Constructivist Grounded Theory Data Collection, Analysis, and Reporting

Charmaz (2014) offered a visual representation of CGT data collection and analysis process (see figure 6). Although the figure shows a linear process, Charmaz clarified that the CGT process is not linear. Researchers who use CGT conduct data collection and data analysis simultaneously via the constant comparative method (Glaser & Strauss, 1967).

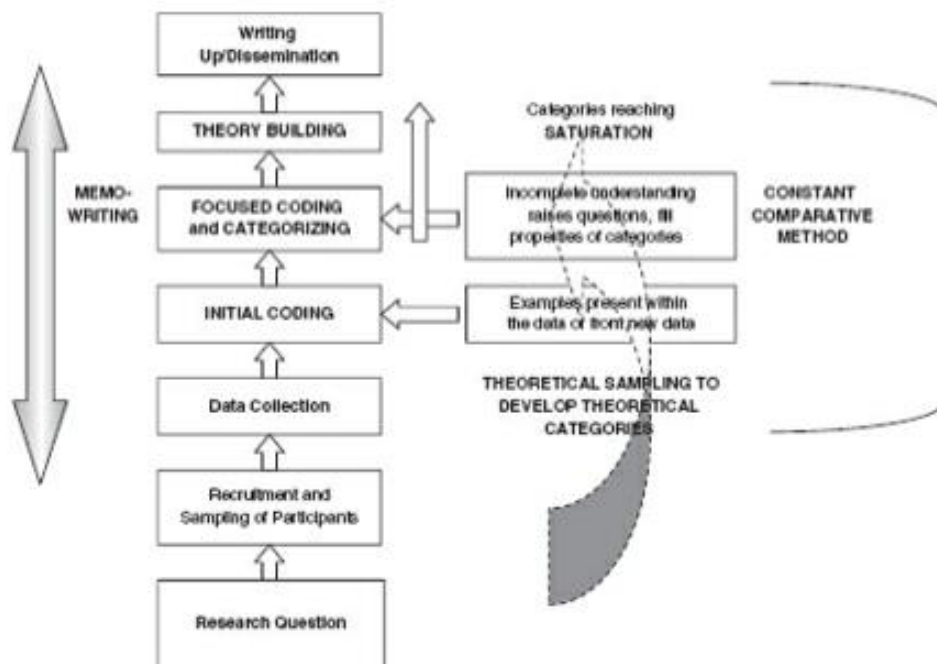


Figure 6. A visual representation of a grounded theory (Charmaz, 2014. p 17)

Data in CGT can come from a variety of sources such as interviews, observations, film, photographs, and written records (Charmaz, 2014; Glaser & Strauss, 1967; Holliday, 2016). For purpose of this study, I focused on interviews as the main source of data. Charmaz (2014) suggested that if researchers use interviews as their main source of data, they must use intensive interviews. Intensive interviews are “gently guided, one-sided conversation that explores a person’s substantial experience with the research topic” (p. 56). Intensive interviews require participants who have experience with the phenomenon and involve open-ended questions that incite in-depth exploration of experiences, meanings, perspectives, and situations. Researchers need to be flexible enough to adjust intensive interviews to follow unanticipated areas of exploration and reevaluate interview guides to improve understanding and validation of the emerging theory.

Data analysis starts as soon as the researcher starts data collection and involves use of comparative methods through the data analysis process. The constant comparative method (Glaser & Strauss, 1967) is an inductive process in which the researcher begins with a piece of data and compares it with another piece of the same data or another set of data (e.g., pieces of interviews can be compared within the same interview or across other interviews from other participants). These comparisons lead to tentative categories which researchers compare to create themes. In time, this process leads to a theory formulation.

Researchers using CGT use a line-by-line coding method to analyze data. Holton (2007) argued that coding is central for GT. A code is “most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data” (Saldaña, 2016, p. 4). In CGT, coding is done in two phases, phase one includes initial coding which involves naming words, sentences, or segments

to make sense of the data (Charmaz, 2014). This initial phase of coding can be used via In Vivo (using participants' words) or Process (actions) codes. The second phase uses focused coding, which allows researchers to synthesize and integrate large amounts of data to develop categories.

Theoretical coding is used in later stages of the analysis. Theoretical codes, using constant comparison, describe how prior identified codes relate to each other forming an emerging theory (Charmaz, 2014). The process between data collection and analysis continues simultaneously until the researcher reaches theoretical saturation (Charmaz, 2014). Theoretical saturation is the point where the researcher does not find new patterns in the data (Glasser, 2001). Data reporting occurs after researcher reaches theoretical saturation. Charmaz (2014) argued that data reporting involves telling participants' story through a thick, detailed description (Geertz, 1973). In addition, data reports should include explanation about the use literature, strengths, and limitations of the theory (Charmaz, 2014).

In addition to data collection, analysis, and reporting, rigor is of utmost importance in all qualitative studies. Charmaz (2014) argued rigor in CGT promotes credibility and trustworthiness. In the next section, I outline strategies to promote rigor in CGT.

Rigor in Constructivist Grounded Theory

Charmaz (2014) argued that researchers should take steps to increase rigor and reduce methodological limitations. Levitt, Motulsky, Wertz, Morrow, and Ponterotto (2017) proposed a set of guidelines and principles to follow for methodological integrity. In data collection, the researcher must assess the adequacy of the data, manage researcher's perspectives, and find the appropriate context and data to maximize the utility of the research (Levitt et al., 2017). In data analysis, the researcher must continue with management of perspectives, and find grounded, meaningful, and coherent findings within the data.

Following Levitt et al. (2017) recommendations (see figure 7), methodology discussed earlier in the chapter (i.e., purposeful sampling, intensive interviewing, constant comparison, and thick descriptions) naturally follow Levitt et al.'s suggestions. In addition, for CGT, articulation of researchers' personal views is achieved by memo-writing (Charmaz, 2014). Memo-writing is an "analytic break" where researchers stop and write notes about codes, questions, concerns, ideas, and assumptions (Charmaz, 2014, p. 162). Memo-writing allows researchers to analyze the data and make deeper connections.

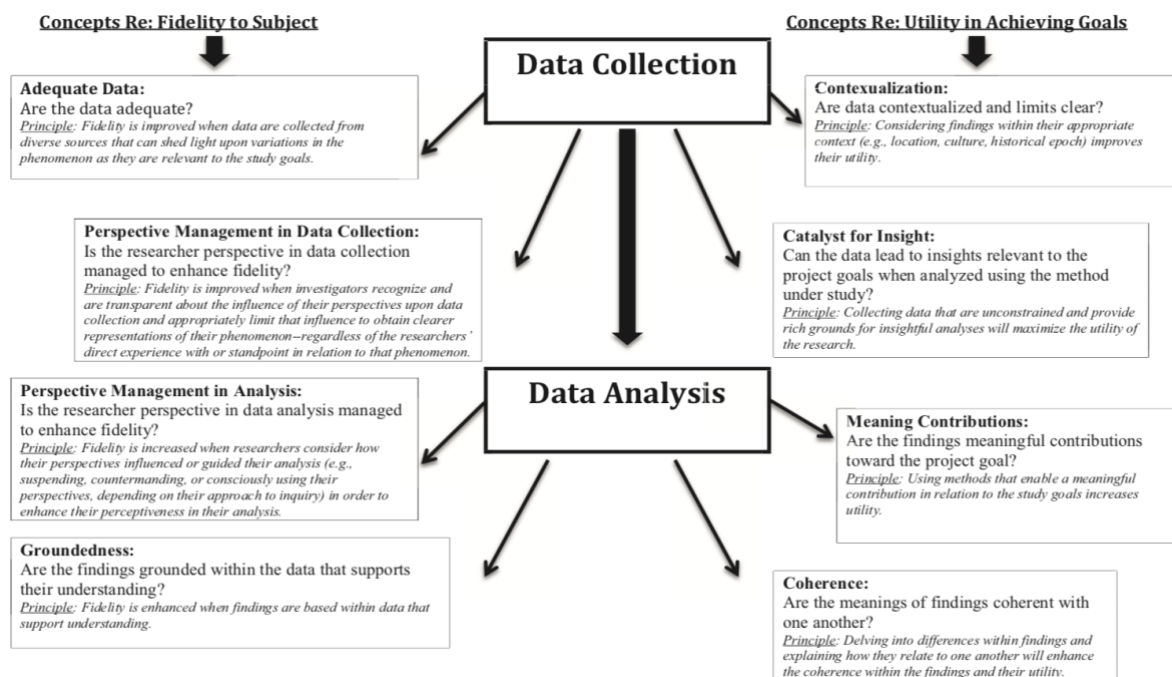


Figure 7. Flowchart to exemplify consideration of methodological integrity in research design and evaluation (Levitt et al., p. 11).

Giving the limited literature regarding social/political advocacy in the counseling field covered in Chapter two, CGT aligns with a research purpose of building a theory that helps explain its process. In the next section, I outline the CGT methodology used in this study.

Research Question

In CGT, research questions attend to what and how questions (Charmaz, 2008). This dissertation study aimed to address the following research question: What is the process of social/political advocacy for counseling leaders?

Methodology

In order to explain the process of social/political professional advocacy for counseling leaders, I employed CGT procedures of sampling, data collection, analysis, and data reporting outlined earlier in this chapter. In this section, I delineate procedures I used to answer the outlined research question, including sampling, recruitment of participants, data collection, analysis of data, indicators of rigor. I also present my positionality statement. Finally, the chapter concludes with a review of delimitations and limitations of this study.

Sampling

CGT encourages the use of purposive criterion sampling for initial data collection (Charmaz, 2014). Purposive criterion sampling selects participants who are experiencing a particular phenomenon that can contribute to the emerging theory and meet a predetermined criterion (Morse, 2007). In this study, I used purposive criterion sampling. To qualify for participation in this study participants must: a) identify as professional counselors as evidenced by master's and/or doctoral degrees in professional counseling, and/or maintenance of professional counseling credentials (e.g., Licensed Professional Counselor, National Certified Counselor, Certified School Counselor); and b) self-identify as having engaged in leadership

related to social/political advocacy or legislative advocacy. Participants who have counseling degrees or licenses share training, values, and goals of the counseling profession, being the best candidates for the exploration of advocacy in the counseling field. Participants must have also self-identified as engaging in leadership related to social/political professional advocacy.

Counselors who engage in leadership have increased access and position to act upon social/political professional advocacy; thus, making them the best candidates for theory formation. I did not exclude participants from this study based on demographic information outside of the criterion.

Sample sizes in CGT are not predetermined. Multiple authors have suggested different sample sizes to reach saturation. Creswell (2014) suggested a sample for GT of 20-30 participants. Morse (2007) cautioned researchers to not set a predetermined sample size because this might bias the analysis. Charmaz (2014) added that reaching saturation depends more on quality of data than on sample size. A review of grounded theory studies in counselor education indicates sample size for reaching saturation was between 8-23 (e.g., Bohecker, Vereen, Wells, & Wathen, 2016; Dollarhide, Gibson, & Moss, 2013; Jorgensen & Duncan, 2015; Parker, Chang, Corthell, Walsh, Brack, & Grubbs, 2014; Wagner & Hill, 2015). Guest, Bunce and Johnson (2006) added that high levels of homogeneity allows for sample sizes as low as six participants to reach saturation. Based on the factors presented above, I aimed for an initial a sample of 10-15 participants with a plan to engage in theoretical sampling at 10 participants. During the analysis and recruitment process, theoretical sampling started after recruiting 13 participants.

Participants

The sample obtained included 15 participants. Three participants unmasked their identities, and their names were used throughout the data analysis. 12 participants desired to

continue to be masked, and a pseudonym of their choosing was used throughout the data analysis. When collecting demographics, participants were asked to self-identify gender identity, age, race/ethnicity, professional associations membership, leadership position, and state. Given the limited number of leadership positions in the counseling profession and the exposure of legislative issues within states, presenting participant data holistically by individual participant creates risk that participants could be identified based on combination of identities and professional association membership. For these reasons, participant descriptions are provided in aggregate only.

The final sample included six participants with a Master's degree in counseling and a certification and/or license in counseling; one with a Master's degree only in counseling; five with a Master's degree in counseling, a certification and/or license in counseling, and a Doctoral degree in Counselor Education; two with a Doctoral degree in Counselor Education only, and one with a Doctoral degree in Counselor Education and a certification and/or license in counseling (see table 1).

Table 1. Professional Counselor Identification

Q1- Professional Counselor Identification	Number of responses	Percentage
Master's & License/Certification	6	40.00%
Master's only	1	6.67%
Master's, License/Certification, and Doctoral Degree	5	33.33%
Doctoral Degree only	2	13.33%
Doctoral Degree & License/Certification	1	6.67%

This study included participants ages ranging from 25-61, 10 cisgender women and five cisgender men. Participants in this study self-identified as White/Caucasian/European American

($n = 10$), Caucasian/Hispanic ($n = 1$), Multiracial ($n = 1$), Multiracial (Black/White) ($n = 1$), and Chicano ($n = 1$) (see table 2).

Table 2. Age and Ethnicity Demographics

Q4- Age	Number of responses	%	Q6- Race/Ethnicity	Number of responses	%
25-34	2	13.33%	White/Caucasian/European American	10	66.67%
30-34	1	6.67%	Caucasian/Hispanic	1	6.67%
35-39	5	33.33%	Multiracial	1	6.67%
40-44	3	20%	Multiracial (Black/White)	1	6.67%
45-49	2	13.33%	Chicano	1	6.67%
50-61	2	13.33%			

Participants' professional association memberships included the ACA ($n = 10$), ACA divisions ($n = 24$), ACA State Branches ($n = 12$), Divisions of ACA State Branches ($n = 5$), CSI ($n = 5$), and other organizations ($n = 6$). In addition, participants engaged in leadership roles within the ACA ($n = 2$), ACA divisions ($n = 8$), ACA Branches ($n = 8$), Divisions of ACA Branches ($n = 4$), CSI ($n = 4$), and other organizations ($n = 3$) (see table 3).

Table 3. Professional Organization Member and Leadership Demographics

Q7- PO Memberships	Number of responses	Percentage	Q8- PO Leadership	Number of responses	Percentage
ACA	10	16.13%	ACA	2	6.90%
ACA Divisions	24	38.71%	ACA Divisions	8	27.56%
ACA Subdivisions	5	8.06%	ACA Subdivisions	4	13.79%
ACA Branches	12	19.35%	ACA Branches	8	27.56%
CSI	5	8.06%	CSI	4	13.79%
Other	6	9.68%	Other	3	10.34%

Participants' regional demographics included two participants were from the northeast region of the United States, three from the Midwest, seven from the south, and three from the west (see table 4).

Table 4. Region Demographics

Q9- Region	Number of responses	Percentage
Northeast	2	13.33%
Midwest	3	20%
South	7	46.67%
West	3	20%

Recruitment

Prior to recruitment, I requested and received Institutional Review Board (IRB) approval (UTK IRB-17-04098-XP). In my IRB application, I delineated procedures of the study covered in this chapter and ethical practices to be followed during the course of this research. After IRB approval was granted (see Appendix H), I started the recruitment process.

Participants were primarily recruited via two sources. First, I posted a call for participation on CESNET, a listserv for counselor education faculty and students with 3400 members. Second, I identified potential participants through a review of professional counseling organizations' leadership directories. I recruited from the 20 ACA national chartered divisions (e.g., Association for Adult Development and Aging, Association for Creativity in Counseling, Association for Humanistic Counseling, and National Career Development Association). In addition, I recruited from the 56 ACA regional chartered branches, covering the 50 states and the District of Columbia, Puerto Rico, Virgin Islands, Philippines, Latin America, and Europe. The ACA provides contact information for the president and executive director for each division and

branch, and I contacted these individuals directly with an invitation to participate. Furthermore, I contacted the current president and past presidents of Chi Sigma Iota, international counseling honor society to participate in this study. Finally, I engaged in snowball sampling by allowing potential participants to suggest additional individuals who were appropriate for the study and fit the criteria. I did not place any priorities over types of division or branches, as long as participants met criteria for this study.

The recruitment email contained an invitation (see Appendix A) to participate in this study or suggest someone else who is appropriate for the study. The recruitment email included a link to the University of Tennessee Qualtrics system. The Qualtrics system included the pre-screening survey (see Appendix C), and request for demographic and contact information (see Appendix D).

Once participants submitted demographic information (i.e., self-identified race/ethnicity, age, gender, name of organization(s) served, and contact information), I reviewed submissions to determine eligibility for participation and contacted participants requesting them to sign the IRB approved informed consent form (see Appendix B) and to provide three preferred dates and times to schedule interviews. After scheduling a time for the interview, I invited participants to participate in a semi-structured intensive interview by sending them a request via ZOOM online conference system. If participants did not qualify for the study during the screening survey, they were auto-directed to a message in Qualtrics indicating that they did not qualify for the study and thanking them for their participation. At conclusion of data collection, 26 participants completed the screening survey, 18 signed and emailed the informed consent, and 15 completed interviews.

Data Collection

In addition to data collected via the pre-screening survey and demographic form described above, data were collected via semi-structured intensive interviews (Charmaz, 2014). Semi-structured interviews include a mix of open-ended questions, some of which include more and less structure. I followed an interview guide (see Appendix E) that contained all the questions I wanted to ask, and some additional prompts to use if participants needed guidance as the interview unfolded. Consistent with CGT methodology (Charmaz, 2014), I continuously adjusted the interview guide to prompt for questions that supported the emerging theory. For example, the theme of the role of professional organizations in advocacy response emerged early on. To clarify individual and professional organizations' responsibility in advocacy action, I added the following question to the interview guide: "How do you see the individual counselor and a professional organization's role within legislative advocacy?"

Interviews were conducted via the University of Tennessee, video-conference software (ZOOM) and audio recorded. ZOOM software allows both audio and video communication; I gave participants the option to choose their level of comfort with allowing or disallowing video. Regardless of participants' choice, I only kept the audio-only version of the interview. The interviews lasted between 60 and 90 minutes, with an average of 65 minutes. Participants were assured that they could choose to stop the interview at any point. I stored recordings in a password protected computer and accessible only to me and the dissertation committee. I used the transcription services rev.com for the interviews to be transcribed verbatim. After I obtained the transcriptions, I reviewed them for accuracy, masked identifiable information for participants who wished to remain anonymous, and sent transcriptions to each participant for review prior to analysis. The participants had two weeks to respond with feedback. Thirteen of 15 participants

responded to the email containing the transcript with modifications or approving the content; in several instances, participants requested specific examples be masked or not used publicly to protect their identities.

Data Analysis

I used CGT (Charmaz, 2014) guidelines for data analysis. Along with two additional coders, we started data analysis as soon as I completed the first interview. The two coders had advanced knowledge of both counseling advocacy and qualitative inquiry. Each coder went through the first and second phase of the analysis process separately (Saldaña, 2016). During the coding process, we started to use a HIPAA compliant, password protected online qualitative software (*Dedoose*) for data organization and storage of codes, field notes, memos, and categories. However, after consistent issues with the software I transition to the University of Tennessee Google Drive. We used a combination of Google Docs and Google Sheets for coding, memoing, and analysis.

We used In Vivo codes for the initial coding method, which requires line-by-line codes using participants' words markers to symbolize speech and meaning. Furthermore, we used Charmaz's (2014) suggested uses for In Vivo codes:

- 1) Terms everyone 'knows' that flag condensed but significant meanings; 2) A participant's innovative term that captures meanings or experience; 3) Insider shorthand terms reflecting a particular group's perspective; 4) Statements that crystallize participants' actions or concerns. (p. 134)

Following initial coding, we used focused coding and concentrated on initial codes that appear the most useful to developing a theory. While engaging in focused coding, we also categorized and compare initial codes across interviews. We also re-coded initial codes using

words or phrases that best represented the same meaning or experience across interviews. For focused coding, we followed Charmaz's (2014) suggested questions about the data:

1. What do you find when you compare the initial codes with data?
2. In which ways might your initial codes reveal patterns?
3. Which of these codes best account for the data?
4. Have you raised these codes to focused codes?
5. What do your comparisons between codes indicate?
6. Do your focused codes reveal gaps in the data? (p. 140-141)

After we completed the first two phases of 3 transcripts, we met to compare analyses within each interview and across interviews using constant comparative methods outlined earlier in this chapter (Glaser & Strauss, 1967). Each time we met, we processed emerging codes, categories, and themes (Saldaña, 2016), along with any gaps we are seeing in the interviews. The meetings assisted in determining additional questions to add to the interview guide and to identify an emerging theory. We kept a memoing journal for each team discussion.

The data analysis team used theoretical coding in later stages of the analysis after I completed data collection and data analysis of the first round of participants ($n = 10$). In the theoretical coding phase, we used themes and categories identified in the prior phase and analyze them to form a coherent story and theory (Charmaz, 2014). We continued to collect and analyze data ($n = 5$) until I reached theoretical saturation and a theory emerged.

Once we reached theoretical saturation, I conducted a member check by sending a summary of themes and categories to participants for feedback. A total of 13 participants out of 15 responded to the member check email. All participants who responded indicated approval of the themes and categories as presented; they did not provide additional feedback.

Rigor Indicators

To ensure rigor in this study, I followed Levitt et al. (2017)'s eight rigor considerations of methodological integrity of *Adequate Data*, *Contextualization*, *Catalyst for Insight*, *Perspective Management (in data collection and data analysis)*, *Groundedness*, *Coherence*, and *Meaning Contributions*. In this section, I will describe strategies I used for Levitt et al., 2017)'s eight rigor considerations

Levitt et al. (2017) suggested to start with the question "are the data adequate?" (p. 11). This is achieved by collecting data from diverse sources. To accomplish *adequacy of the data*, I recruited nationwide from diverse professional organizations, and different levels of leadership involvement. *Contextualization* refers to data delimitations being clear and appropriate for the context of the phenomenon. To achieve contextualization, delimitations set for this study were via participant selection (purposive criterion sampling) and focus on the type of advocacy domain. *Catalyst for Insight* questions if the data to be obtained can lead to insights related to the phenomenon (Levitt et al., 2017). To achieve this consideration, using CGT guidelines, I selected participants that not only "fit" in the phenomenon to be studied, but that also provide rich experiences that help in the construction of the theory. Furthermore, also suggested in CGT, literature was used throughout the research study, including data reporting in relation to the emerged in the theory.

Perspective Management (in data collection and data analysis) refers to the researchers' ability to manage their perspective and considering how their perspective influences the data collection and analysis (Levitt et al., 2017). Prior to data collection, I presented a positionality statement to explore my personal views and biases towards this research inquiry; throughout data collection and analysis I used memo-writing. Following Saldaña's (2016) guidelines, I used

memo-writing prior, during (after each interview) in form of field notes, and after to data collection (data coding and analysis) to process questions, connections, concerns, and ideas. Furthermore, to limit the impact of my perspective on the data analysis, I used coder triangulation.

According to Levitt et al. (2017), *Groundedness* refers to how data are grounded in participants' understanding of the phenomenon. To capture participants' experience, I used In vivo codes and actual words in the first phase of coding. I also send a de-identified clean copy of the transcription to participants to make comments, edits, and provide additional information. This step was aimed to assure that participants were comfortable with the interview data, giving them the opportunity to ask for parts of the transcription to be omitted, modified, or expanded. I also used member checks to allow participants to provide feedback on themes and categories found in the interviews (Guba & Lincoln, 1989). Member checks assure that study findings represent participants' meaning of the phenomenon. I used member checks twice during this study; first after the interview to verify the accuracy of the transcript, and later after the main categories and categories were identified. *Coherence* refers to how the findings relate to each other. This recommendation was achieved using constant comparative analysis outlined in CGT (Charmaz, 2014). The data were compared within each interview and across interviews. Lastly, *Meaning Contributions* suggests the methods used for analysis "enable a meaningful contribution in relation to the study" (Levitt et al., 2017, p. 11). The reasoning for selection of methodology, sampling criteria, and analysis were outlined under the methodology section of this chapter.

Positionality Statement

As a part of credibility, researchers need to examine how their views and values could affect the research inquiry and its results (Charmaz, 2014; Chiovitti & Piran, 2003). Savin-Baden and Howell Major (2013) suggested that positionality statements include philosophical and personal lenses; potential influences on the research, including political and personal views; researchers' positionality on the emic (internal) versus etic (external) continuum; and ways in which the researcher may influence the study. My positionality statement is included below.

Growing up as a Venezuelan, a sister, and a daughter, it's always been in my family's tradition to put relationships first. I grew up in a place of empathy, unconditional positive regard, support, and honesty (specially in my relationship with my siblings), which already prepared me for my future as a counselor. However, it was a special relationship in my family that brought me to the counseling field. After my parents divorced, I developed a close relationship with my step sister, who grieved over her father's death for many years. In our time together, our relationship helped her heal. I saw then that relationships are powerful and I wanted to do more for others, which led me to pursue the counseling profession. It is because of my belief in relationships that I am naturally inclined towards qualitative inquiry. Qualitative inquiry seeks to deeply understand the experiences of the participants. The in-depth understanding is facilitated by the relationships the researcher has with the participants and with the phenomenon.

My interest in qualitative research extends from my family and cultural background, and my inquiry regarding social-political advocacy extends from three areas: my identity as a person of color, my work with unserved populations, and my experience growing up in political turmoil as a teenager.

As a person of color identify myself as a foreign born Latina immigrant and I have experienced instances of direct discrimination. I have been made fun because of my accent, I've been told "this is America speak English" and to go back to my country, and I have been called an ignorant and a "third-world" class person. In all these instances of discrimination, I felt a sense of lack of power, not feeling empowered to speak up against this type of behavior.

However, I have realized that while as a person of color I have oppressed identities, I also come from a place of privilege. As a highly educated woman, middle-class, and heterosexual, I hold privilege that I can use to give a voice for those who do not feel empowered and advocate for them.

In addition to my personal experience, I have worked directly with low income, immigrant families. These families were often undocumented and I saw their fear, pain, and a total lack of power. I've also seen children without any educational future because of their undocumented status. Therefore, as counselors, I believe we have the privilege to be positioned with access to represent our clients, and give voice to the voiceless.

Empowering clients and the profession can be achieved via multiple levels of advocacy. However, I feel that social-political professional advocacy holds an important role in the counseling profession. Perhaps, this extends from my experiences living in a country with socio-political turmoil. When I was 12, living in Venezuela, Hugo Chavez was elected president. Little did I know that following this election, Venezuela will experience almost two decades of political turmoil and social unrest. From age 12 to 17, I was involved in political rallies, national strikes, and experienced shortages of food, medication, and basic needs. While the status of Venezuela has not improved, in fact, has deteriorated significantly, this experience taught me that the

power of the people, political activism, and voice. Therefore, I place importance in social-political professional advocacy in my profession.

When it comes to my positionality in this research, I consider myself to be in between the emic and etic continuum. I am a counselor, a future counselor educator, and a leader in Chi Sigma Iota, and NBCC minority follow, and a student liaison for the Tennessee Licensed Professional Counseling Association. In addition, I have been active within those leadership positions to battle Tennessee state laws that are blatantly discriminatory and impact access to care for vulnerable individuals. Therefore, I have an “insider” perspective when it comes to leadership in the counseling profession and social-political professional and social justice advocacy. However, I have not been a leader in professional counseling association, and I have limited experience social-political professional advocacy; thus, also having an outsider perspective. In addition, I also stand as an outsider due to my prior graduate training. I was trained in my master’s program as a counseling psychologist. Counseling psychologists differ not only in training, but also in certain views about leadership and advocacy.

On the other hand, my passion and personal motivations towards this research might influence the way that I view social-political professional advocacy action and motivation in the participants. Therefore, throughout this research, I must engage in reflexivity, memo-writing, and consultation with my additional coders to avoid placing biased meanings onto the participants experience.

Background of the Coders

As a rigor strategy, I recruited two additional researchers for coder triangulation. The first coder was Rachael Marshall, a Doctoral Candidate in Counselor Education. Rachael had advanced qualitative research knowledge, experience, and was pursuing a qualitative research

certificate. Rachael had experience in social/political advocacy and held several leadership roles in state organizations.

The second coder was Jillian Blueford, a second-year doctoral student. Rachael had advanced qualitative research knowledge, experience, and was pursuing a qualitative research certificate. Jillian also had in leadership experience being an emerging leader for a national professional organization.

Summary

I began this chapter with an overview of qualitative methodology and types of grounded theory. I continued by exploring reasoning for the use of CGT for this research study, and I outlined best practices for sampling, data collection, and analysis in CGT. I then described methodology for this study including sampling, data collection, analysis, and reporting. I concluded this chapter by describing procedures for rigor I employed in this study, and outlining my positionality statement.

Chapter 4: Findings

The purpose of this study was to explain the process of social/political or legislative professional advocacy for counseling leaders. I used constructivist grounded theory methodology to analyze fifteen semi-structured interviews with professional counselors who engaged in leadership related to social/political professional advocacy. During analysis, four major themes emerged, *Connection to Personal and Professional Identity*, *Use of Personal and Professional Community*, *Making it your Own*, and *Picking your Battles*. The four major themes are divided into three main sections *Advocacy Catalyst*, *Advocacy Action*, and *Advocacy Training*. In addition, the coding team identified one theme that was outside of the process of legislative advocacy but was important to note: *Defining Legislative Professional Advocacy*.

In this chapter, I present the results of this study. I will start with an aggregate definition of legislative professional advocacy found across the interviews. I will explain in detail the Three Tiered Legislative Professional Advocacy Model. As I present results of this study, I will use a mix of pseudonyms and participants' first names as requested by participants; to further protect identity, I only reveal references to states for those who chose to unmask their identities.

Defining Legislative Professional Advocacy

Throughout the literature review and methodology, I used the term social/political professional advocacy based on the *Advocacy Competencies* (Lewis et al., 2002). This term did not always resonate with participants. To provide more clarity and precision of the intended goal of advocacy efforts, I will use a new term, legislative professional advocacy, when referring to results and implications of this study. Due to lack of empirical support regarding how legislative professional advocacy is defined, the following definition is an aggregate of the participants' own definition of legislative professional advocacy: *Advocacy related to legislation to improve*

or change policies that impact the counseling profession, clients, and counselors' ability to practice.

To support this definition, Spike shared *“Well, either supporting or not supporting and I think bills in the legislature how it might impact our profession, but also how it might impact our clients.”* Similarly, Karen disclosed *“having to improve or change policies that impact, um, mental health services access and the clients that we serve.”* Ava added,

Well when I think of legislative advocacy, I think of advocacy geared towards legislative changes, like getting legislation introduced, getting it moving, getting it passed. Whether it's around federal laws or state laws, licensure types of things. But at the end of the day, what matters is the legislative advocacy that actually impacts our ability to practice and be reimbursed.

Joe shared his view on why legislative professional advocacy was important, *I think as a country we've moved forward, really (1 sec). in the Obama administration, we made some huge strides regarding NIH and some of these big organizations regarding addiction. Then, most recently, there's some concern that things are being cut and changed and tax laws, and so I think it's a time where it's important to make sure that we are, as a profession, advocating and being involved politically.*

As they defined legislative professional advocacy, participants shared that there is an urgent need to increase national recognition, continue to grow as a profession, and protect professional counselors' ability to practice.

The Three Tiered Legislative Professional Advocacy Model

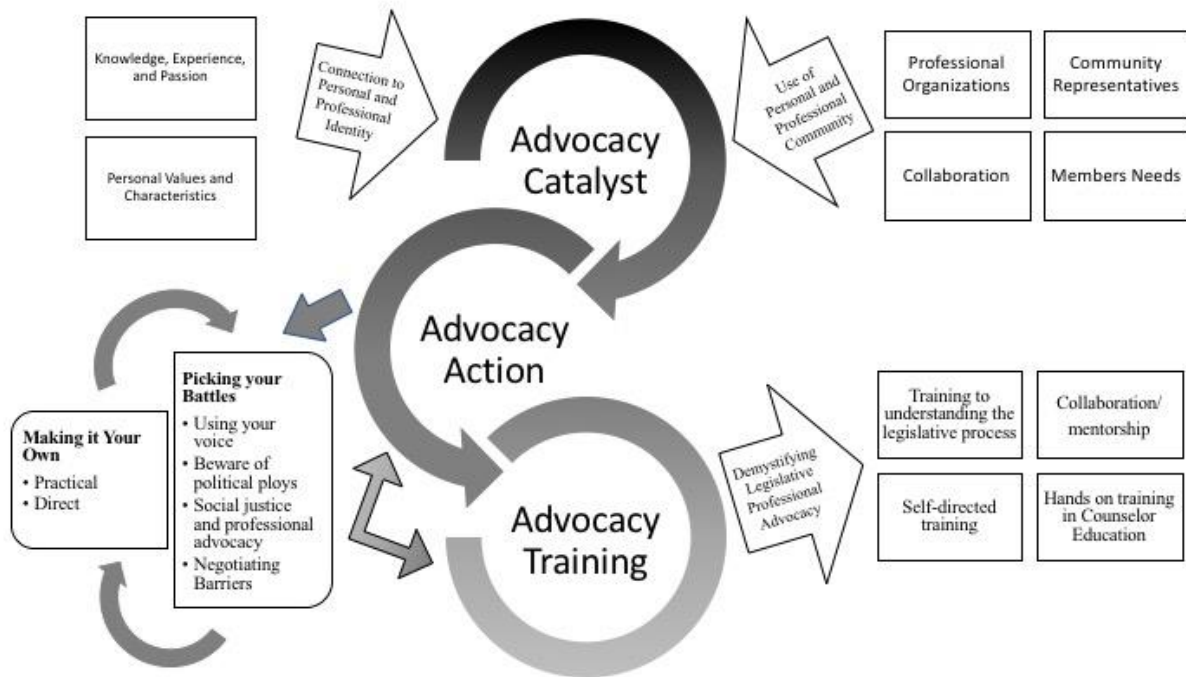


Figure 8. The Three Tiered Legislative Professional Advocacy Model

The Three Tiered Legislative Professional Advocacy Model (see figure 8) is separated into three levels of advocacy: 1) catalyst, what fuels advocacy; 2) action, what advocacy action entails; and 3) training, how to learn about advocacy. In this section, I will explore the three tiers of this model, alongside the four main themes of *Connection to Personal and Professional Identity*, *Use of Personal and Professional Community*, *Making it your Own*, and *Picking your Battles*.

Advocacy Catalyst

The *Advocacy Catalyst* tier represents what fueled participants' advocacy action. At its core lies the connection to personal and professional identity. Connection is provided by

knowledge, passion, experience, professional and personal values. Encompassing connection is the use of personal and professional community that is supported by professional organizations (POs), community representatives, collaboration, and community and POs members' needs. POs inside of the professional community are sources of motivation and information; POs act as conduits and are supported by lobbyists. In the following section, I will describe in more detail theme inside of the *Advocacy Catalyst* tier and provide participants' insights of each theme of *Connection to Personal and Professional Identity* and *Use of Personal and Professional Community*.

Connection to personal and professional identity. At the center of *Advocacy Catalyst* is the connection to personal and professional identity. Personal and professional identity refers to knowledge, experience, passion, and values than encompassed participants' personal and professional lives and provided a meaningful relationship to the advocacy need. The *connection to personal and professional identity* theme is divided into two main categories; *experience, knowledge, and passion* and *personal values and personal characteristics*.

Experience, knowledge, and passion. Experience and knowledge about an issue and passion for advocacy fuels and informed advocacy action. Advocates acted upon issues that were tied to their expertise, values, and interest. Blair's passion fueled her advocacy interest,

I would say I'm a counseling leader in areas that I am passionate about. So I'm passionate about research and I'm passionate about the human animal bond. If I'm passionate about something, people are gonna know it. (laughs) I'm gonna try to rally as many troops as I can to join in on that with me, if possible.

Similarly, Ava said if she is passionate about something, she will act on it,

I mean if I'm, listen, I'm the kind of person if I am jazzed about something professionally, everybody's going to know it, and I want everyone to know it. You know? So I'm definitely, I'm going to mobilize, you know, reach out, mobilize, get people involved.

Joe's knowledge and experience helped him focus his efforts,

It really kind of depends on the person. For me, I'm particularly interested in military-related issues. So that drives my interest in this particular bill. Then being somebody who's been a Master's addiction counselor forever, I'm always interested in legislation regarding addiction and how it's perceived.

Josh also processed that his knowledge and interest for legislative advocacy motivated him,

Yeah, I think I have an overall interest in public policy and advocacy and I think that might motivate me more so than others in regards to getting more involved, in regards to some of the nuances that go with that. And at least locally, try to be a subject matter expert on these issues so that I can advise the folks that may not have a specific interest or passion but sometimes are willing to reach out and assist in regards to rectifying some of these issues. I think there's not a lot of folks that take on that responsibility, so I've seen that as kind of the role that I could play.

Experience, knowledge, and passion were tied with participants' views of their own professional identity and subscription to professional values. Karen processed the connection between legislative professional advocacy and counseling identity, *"being an advocate is to me a primary identity as a part of my counseling identity and I strive to support the growth of that identity and others within our counseling profession."* Karen further added,

Makes you to feel powerful I think. Um, you realize that there are all these different levels of impact. Um, I think it helps to solidify our place as a profession in the bigger scheme of our society because counseling is a relatively new profession, and I think part of what I got out of some of the trainings that I went to and part of what is a part of me and my leadership identity is really valuing our profession.

Benito discussed how legislative professional advocacy fostered professional identity development,

I think it further cements your identity, and who you are to believe that this kind of things are important forces you to think about who you are within the profession, and the type of work you should be doing in the profession.

For Christy, advocacy action was fueled by a combination of professional and personal identity,

I'm very proud to talk about the fact that I volunteer for an equality organization that promotes LGBT rights. I'm so proud of that, I really am, and I talk about it all the time, and I think that's probably something more appropriate, given like all of these pieces of my identity, like they're connected. They are. There's no way to separate it.

When issues did not match experience, knowledge, or passion, participants often decided not to act. Blair explained that she would not advocate for an issue if she did not have adequate knowledge, *“there's things that I think are important but I don't feel like I've done enough research or had enough exposure or clinical experience to be able to advocate for it.”* Similarly, Josh will only act upon advocacy needs when he considers himself a subject matter expert, *“I would say advocating for school counseling legislation is not something that I consider myself a*

subject matter, an expert in.” Benito processed that he will not act upon an advocacy need if he does not feel passionate or connected to the need,

Something is passionate to me I will get involved with it. There have been cases where something just doesn't, that's not me. That doesn't speak to me. I'd rather focus my energies on something else. So I'm trying to think if there's like a specific issue. It might be some of the advocacy that's happened nationally around having counselors be reimbursed for their work with veterans. While that's an important topic I get it. It's just not something that speaks to me as much.

Across interviews, experience, knowledge, and passion were essential factors for advocacy action. Feeling connected or invested with issues helped participants persevere through the challenges of legislative professional advocacy. In addition, personal values and characteristics also acted as catalysts to advocacy. In the next section, I explore the next sub-theme of *personal values and personal characteristics*.

Personal values and personal characteristics. Personal values and personal characteristics were also essential elements that fueled advocacy action. Participants disclosed that key personality traits informed their efforts. Jason discussed the role of personality in leadership:

I would say I lean pretty heavily on the introverted end of the personality spectrum; and I think Western contexts like America, you know, when we think about leaders, we get a pretty extroverted type of advocate a lot of the time, because leadership probably fits with a lot of our images of the outspoken and bold leader. Doing lots of sort of leadership like organizing, meeting with community members, getting people together, things like that. I

think that while all that's important, there's another expression of leadership that still relates to the advocacy stuff.

Jason later added, *“as an introverted person, I think leadership takes a lot of different forms in the context of your... In my context.”* In contrast, Spike identified her extroversion as something that helped her feel more capable of being on the spotlight and approach representatives. She said,

It's kind of funny because my mother has said to me in the past, "Why is that you are the one who was always the outspoken one and your partner she's always the quiet one? Why is it you're always the one who has your face in the newspaper or on TV or whatever?" I said, "Well, I'm the extrovert, mom, and she's the introvert. Literally, we can run into our legislators at the grocery store, at the post office, at the coffee shop. I saw US Senator (name of senator) at Qdoba, a Mexican restaurant, and I jumped up and offered to him to pay for his food and introduced myself and I said, "Senator X", I'm president of (state) Counseling Association and I want to thank you for sponsoring whatever it was about getting equal treatment for counselors on payment as social workers.”

Other personality traits also helped participants feel empowered. Ava disclosed that her persistence motivated her towards advocacy, *“I mean personally, also I'm very persistent. My success is about nothing more than persistent, very persistent.”*

Personal values also play a key role in legislative professional advocacy. Karen's value of relationships motivated her,

I have some personality characteristics that also contribute to being involved in leadership. Um, I mentioned like just being very relational, um, I think that's the part of my identity that I choose to be an LMFT and yet I still choose to be involved with the

counseling association and not just a family therapy one. Um, what's important to me about that is that I think we're all counselors, so I, I actually believe in ACA's model of we're all counselors first and then we have different specialties, and we have different settings in which we work. Um, and so I think, I think part of my personality I think I like to make a difference, so that's kind of you know baseline like being very service driven. Similarly, Lisa valued finding a balance between her profession and the world around her,

I have never been one who kind of just wants to go in my office and shut my door, and just deal with the client in front of me. I love doing that, but I need that balanced with what's going on out in the world and our role in it. I think there are certainly, I'm not an anomaly, there certainly are others who are like that as well.

Personal values can come from family, culture, community, or personal identity. Karen disclosed that her parents were active legislative advocates, and this exposure motivated her towards legislative professional advocacy. She said,

I had seen my parents do that. Um, my dad was involved in some legislative advocacy kinds of things related to his work, we lived an hour from the state capital growing up, um, so I think I had some exposure to that growing up.

Joe felt empowered to be more active as an advocate because of the prevalence of legislative advocacy in his community:

I think I've been fortunate to be out in (state) because it is a more socio-politically inclined culture. I feel like in other places I've lived it's just not been as big of a deal. So I just feel fortunate that I've gotten to have the experience being out here no matter where I land eventually.

Benito identified community and societal issues that surrounded him as motivators for his advocacy action and his personal and professional identity development. He said,

So I grew up at a time where I was I guess in college at a time, where there were a number of attacks on issues related to equity and access and education. So I got involved in those kinds of issues. In advocacy and resistance to policies that I think limited the opportunities and access for poor students, for students of color. So it was much less around a profession per se than it was around specific issues. So maybe that's why specific issues still feel more comfortable than necessarily the professional advocacy. The professional advocacy really only been over the past five, six years, and I guess it's been more that part of my identity is kind of cemented. That engaging in those types of advocacy issues has felt more important, and more consistent I think with kind of the values of the profession as well.

Likewise, Mindy argued that current community concerns impacted how she views her ethnic identity and personal and professional values; in turn, this motivates her advocacy action. She disclosed,

The Black Lives Matter movement was particularly important in my development, because it really altered the way I viewed myself. I'm bi-racial, I'm half black, half white. But I never really viewed myself necessarily as a person of color. I would just say, "Oh, I'm bi-racial." But I didn't feel like that was the thing that defined me But as the Black Lives Matter movement grew, and I saw these different reforms and there was kind of that over racism again, I think that kind of impacted my view of myself.

Similarly, Spike's personal identity as an LGBTQ+ community member informed how she viewed legislative professional advocacy and focused how she chose to get involved,

I am active with the LGBTQ community as an out lesbian, and so, I'm aware ... Through other LGBTQ organizations aware of issues and respond that way. Also personal, I'm on the ACA Advocacy Network so I get emails from them. That's national level.

I would say first of all something that's going to impact me personally or my friends, so I would have to say personally the LGBTQ issues would be on the top of my ... I've also been a member of the local NAACP chapter for years and race issues are important. We don't ... Kind of like I think of LGBTQ issues if there are say only 10% of us in the state and we don't have the support of allies, we're never going to get anywhere.

Personal values were also attributed to processing of privileged identities. Some participants used privilege to support advocacy efforts. Although Spike was part of an unrepresented community as an LGBTQ+ member, she used her privilege as a Caucasian woman to speak up for issues that impacted clients of color. She said,

Our ethnic minority population in the state of (masked) is less than 10%. If the Caucasians that the white people don't stand up for race issues then nothing is going to get done. and.. It's safer for me as a white person to stand up for a person of color than the person of color to stand up.

Due to his privileged identity as a white woman, Jason felt safe to use his voice, *I got involved in some civil disobedience as a part of that, one of which resulted in getting arrested, which wasn't really a big deal for me at the time. I'm a white male, in the middle class; I didn't have to worry too much about me around cops. It wasn't that big a sacrifice, but nonetheless, it felt really important. I think that would be sort of, hmm, I don't know, walking the talk, I guess.*

As with knowledge, experience, and passion, participants often decided not to act when advocacy issues did not match their values. Daniel disclosed,

There are times when something will come out and maybe I don't agree with it. I can't think of a good example off the top of my head, but there certainly have been times when there have been issues that came out that we were called to engage with and I just don't agree with ... If I don't support the initiative, even if it's coming from my professional discipline, I'm not likely to get involved.

For Spike, this involved asking critical questions about her connection with the issue, *Do I know anything about the issue? Do I have time, moment when I'm looking at that email saying, "Do something about it?" How much does it impact me personally or somebody I know? It doesn't have ... necessarily be a friend, it could be a client, but it's somebody I know and whatever this issue is it, it could impact them.*

Personal values and personal characteristics are critical components to *Advocacy Catalyst*. Values and personality traits provided additional insight about participants' connection to the issue. Participants also used their personal and professional community as an *Advocacy Catalyst*. In the next section, I explore the theme *use of personal and professional community*.

Use of personal and professional community. Use of personal and professional community also serves as an *Advocacy Catalyst*. The use of *Personal and professional community* theme includes: addressing advocacy needs of POs and local communities, POs as a source of connection and information, POs serving as a conduit, using local communities as a resource, collaboration, and connection to state representatives. In the next section I will discuss the first sub-theme *professional organizations and community needs*.

Professional organizations and community needs. Advocacy action is informed and influenced by community needs. Mindy highlighted the difference between national and local community issues, “*here's these national issues. But I'm also trying to think about, okay, let's look, what's going on where I am at right now, and what can I do?*” In addition, Lynn disclosed that she couldn’t be an effective advocate if she didn’t know her community and its needs. She said,

We can't be influential toward any group or any particular population that we might serve unless we are able to speak to their needs and what we can do to meet those. And so, I think that's one of the biggest parts of it.

Lynn recalled a specific situation when she used community needs to inform her advocacy action,

Community college counselors, excuse me, were having a really hard time with being replaced. They were replacing LPCs with academic advisors, which was not a good idea. That was one of the advocacy pieces that we, as a unit, got involved in in the (state) Counseling Association, trying to help find a way to effect change there.

Daniel also used understanding of community needs to discern what needed legislative professional advocacy. He disclosed,

When I was in (state), I lived in the most rural county in (state). My clinic was one of only two mental health, well, I take that back, was one of only two private practices serving the county that I lived in. One of the issues that I ran into fairly routinely was the issue of dealing with suicidal patients who needed to be evaluated for, or really needed inpatient to protect them. As a professional counselor licensed in (state), I was not able to do that

myself. I wasn't able to pink slip patients when I judged them to be a danger to themselves or others.

He later added,

there were numerous occasions when I had people who needed to be inpatient and I had no way of getting them in. That issue was one that I knew about, because I was dealing with it as a clinician fairly regularly.

On the other hand, participants' advocacy action was also fueled by needs of PO members when they were in leadership positions. As past president of a state counseling association, Sunny argued,

I think that our professional organizations are organisms or mechanisms of advocacy, because most professional organizations are serving us as the members of it. Hopefully, a professional counseling organizations is meeting the needs of its members, and one of those important things is advocacy.

Similarly, Josh, a past president of the New York chapter of AMHCA disclosed that as an organization, advocacy action was informed and decided by members and their needs,

Issues get identified and brought to light through our membership, and then based upon those issues coming up for one or many more people, those issues might become more a priority than other issues. I think we as a state organization we have many legislative issues, but some have more priority over others. So, depending on what our membership really sees as priorities, whether that be at the state level or the national level, are the things that we're acting on and more aggressive on compared to some things that might be less of a priority. Because obviously, you only have the resources to really dedicate to

a few key things and then other things tend to have to wait depending on the results of those other things.

Christy, a current president of a state counseling association also recalled how voices of PO members were considered in legislative professional advocacy action,

We kind of look at what's ACA promoting, what's our code of ethics say, what does our membership generally think about this issue, what does our profession generally think about this issue, and do they need us? Are there other people that are voicing support for this, or do we really need to step in here? So, that's kind of the discussion that goes on when we're deciding whether or not to support, or lobby, or advocate for something.

Across interviews, participants recalled taking into consideration local community and PO member needs prior to advocacy action. The needs also assisted in empowering participants towards action. Community influence also acts as a catalyst in advocacy action. In the next section, I will address the next sub-theme in the *use of personal and professional community* theme, *community influence*.

Community influence. Size and culture of participants' communities influenced their advocacy action. Smaller communities assisted participants in getting to know their representatives and build fruitful relationships. These relationships facilitated advocacy action. Spike reflected on her own community and how it facilitated connection:

Right. Now, I have to tell you that maybe you haven't been to (state) but it's a pretty small place and I saw a senator at the post office or a state senator so I'm at the post office last week and he said, "Spike." Calls me by name. "You sent me a postcard and I don't understand what it was about." I had a chance to talk to him. It was about an immigration issue because I'm also involved with the Immigration Alliance of (city).

Coming also from a small community, Blair discussed how she used the community's culture to build relationships,

Here this community is so small that you know the delegates and I recently spoke at a legislative roundtable panel discussion so now quite a few of them know me because now my face is out there. It's not that difficult to build a relationship out here with delegates. So I think at this point, I would feel comfortable now that I feel more integrated into the community, I would feel comfortable setting up a meeting to go meet with them.

Karen and Mindy processed that connection to their communities informed issues they wanted to advocate for and inspired them to be active advocates. Karen said,

I think for me having grown up in a community that had, you know, all these different kinds of systems in a small community but mental health being part of that. Um, there are so many ways that you can make a difference and I think I probably had some of that in my mind before even going into counseling.

Similarly, Mindy disclosed,

Well, one, I think about, so I would say I'm very focused on my clients, and my community. So particularly there's a large number of Dreamers in the state, and so when all of this legislation came out, it was important to me to send my Congressman a letter, and urge them to be thoughtful of the Dreamers who are also part of what makes (state) great.

For some participants, the community culture was highly political, making social/political professional advocacy more accessible. Joe shared that his community was very politically active,

For me, being in (state), I'm in a very politically active place. So that's just part of the culture here. And then thirdly, I just think it's the right thing to do. I mean, if I'm somebody that's going to be working in the mental health field or in the counselor-educator field, I feel like I should be someone who can form and create some of that space as well. Especially because I feel like being a counselor-educator, mental health professional, uh, we still have a long way to go in terms of growth development as a profession.

Strong professional identity in Daniel's state helped him connect and seek advocacy involvement,

So, I started my counseling education career in Ohio, and you may know that Ohio is really a strong state for professional counseling. We have a very strong presence in the field; a lot of our formative figures were connected to Ohio in some way, shape, or form; the state level counseling profession or the counseling profession at the state level is very active and very strong.

Other participants disclosed that community politics deterred them from acting upon issues due to a sense of hopelessness that "nothing is going to change." Sunny recalled how she felt silenced in her community,

I think from another thing from social, political side is it can be difficult for anyone to have a minority opinion. Depending upon where you work, where you live, are you within the majority or the minority? I think that can impact one's efforts. I can think of, prior to living here in south (state), I spent two years with my husband and we lived in (state). I found it extremely difficult to advocate because it was such a different social, political climate than where my own ideas and philosophies are. It was extremely challenging

because I wasn't born and raised in (state) so therefore even my own ideas were not really welcomed, versus coming to south (state) where there is a lot of racial diversity, but even just more diversity in thoughts and beliefs. I find that it's much easier to advocate when there is diversity in all aspects than when that is lacking.

Similarly, being in the “minority” in her community also influenced Mindy’s advocacy. She stated “it's probably that just knowing that there's nothing I can say. I think I almost self-defeat. Like it is like I decide, is it worth my time? Because nothing's going to change.”

Across all interviews, participants’ connection to their communities and stakeholders facilitated advocacy action and made access to legislative professional advocacy more attainable. On the other hand, when community culture was highly divisive, participants felt hopeless and sometimes saw legislative professional advocacy as futile. Another component of the community is professional organizations (POs). Next, I will discuss the sub-theme of *professional organization (POs)*.

Professional organization (POs). POs served multiple roles in legislative professional advocacy. The role of POs was the most frequent talking point for participants. Across interviews, participants shared that POs facilitated connection to their knowledge, passion, or profession; were a source of information; and served as conduits between state and federal governments and the membership.

POs as a source of connection. POs allowed participants to connect with others with similar passions and interest. Nancy shared that POs offered a connection that helped her grow as a counselor,

I just value that so much because I feel like I know people and I have some very good friendships that have developed through AMHCA. And I've also ... What started to really

almost anger me would be ... I developed this breath of how I looked at counseling because I was going out of Knoxville and going out of Tennessee, and I was learning from people and interacting with people and connecting with people and learning things at that higher, professional level, and, sometimes, I would then think ... And then I would come back and I would try to bring some of that energy or passion.

Daniel disclosed that POs helped him transition into a new state counseling community and empowered him towards advocacy,

I joined the Ohio Counseling Association soon after moving there, and then also the Ohio Association of Counselor Educators and Supervisors, and fairly quickly started getting involved with leadership and advocacy, and then stayed involved in leadership and advocacy the whole time I was there. To some degree, that continues.

By providing connection to their communities and passions, POs contributed an incentive for action and facilitated collaboration.

POs as a source of information. POs were often the source of legislative information and action. POs provided information about legislative issues and guidelines for how to act upon the issues. This facilitated advocacy action. As Tennessee Counseling Association president, Lisa highlighted the role of the PO in keeping members informed,

As far as the organization goes, the professional organization and associations, I think it's our job to keep an eye on the landscape and to let people know what's happening and what's coming, and what the bigger picture is. Then, and this is where I diverge a little bit from some others, I personally think that it's my job to let you know what's going on, and then your job to decide how you feel about it and what you want to see happen.

As both a leader and a member of POs, Daniel discussed how he used POs to act upon legislative professional advocacy,

Typically, in my role, one would be to respond to that call to action [from POs], whether it's contacting a legislator on an issue ... well, so,.. oftentimes, that means contacting a legislator on an issue, so I would do that, but I would also spread the word. In my case, as a counselor educator, that means letting my students know and encouraging them to advocate; sending information out.

By providing information about current issues that need advocacy and providing information about how to do it, POs contributed facilitated advocacy action.

POs as a conduit. POs served as a conduit between legislative issues and the counseling community. POs were responsible for identifying and communicating legislative issues to their members. As a liaison in a state organization, Jason shared, *“in our case, so that on the state level, the professional organization is directly connected to those real-life issues on the ground.”* As a state leader in a PO, it was Lynn’s responsibility to communicate with state legislators about the counseling profession. She said,

So we do have some responsibility to help them understand who we are and what we do, why we do it. What we're trying to accomplish in the work that we do, not just with our clients individually, but as a collective. And so, in (state), we have an opioid crisis. It's just blown up in the last two years. And a lot of what the people on the ground are doing out there is work with substance abuse. And without that advocacy of people knowing what it is that we do and how important that work is.

As a state license board member, Lynn was a liaison to prevent LPCs in colleges being replaced by advisors. She recalled,

That was probably my first exercise in advocacy, in actually reaching out not only to legislators, but also to the accreditation body, SACS, for both the community colleges and the four-year colleges, to see about whether the understanding of what the counselor does on campus and the importance of that role for supporting students and supporting student success could be introduced into the SACS Standards because that would be one way that the college administrators would listen.

As a current branch president of AMHCA, Josh viewed POs as translators and communicators of legislative issues,

Yeah, A lot of times we'll get background information prior to bills. Hmm, you know, I think each organization really has some good policy folks that can really guide a board, hmm, and really, we look to those policy folks to help translate legislative language and to see how that's going to actually affect the profession. And I think it is our job as a counseling organization, or an executive board, or a board of directors, to really interpret that information and see how that's going to affect, hmm, you know, the profession, or consumers, and make sure that's being done in a way that is the best for the organization.

For all participants, POs served as essential *Advocacy Catalysts* by providing a sense of connection, providing direct information about current issues and how to advocate, and serving as conduits and translators of legislative issues.

Lobbyist as a resource for POs. POs are resources for their members, and some POs used lobbyists as their resource. The legislative process can be arduous, complicated, and time consuming. Within their roles as PO leaders, participants reported that they retained the expertise of lobbyists facilitated monitoring of legislative advocacy action. Nancy, a past leader of

AMHCA, noted that lobbyists were essential to their organization, *“there was a person hired by AMHCA to be on the hill. He was so knowledgeable. And that's the part you can't replicate.”*

Jason and Lisa processed the importance of a lobbyist is their POs. Jason said,

When it comes to mental healthcare. I think, as I understand it, what our lobbyists do, because they're LMHCs, they have an inside perspective that means in a short amount of time, because it's likely to be a short amount, a short amount of face time they actually get with an assembly member or a state senator, they can break it down: what our needs are, why it's important, and why this bill should be supported in clear and concise language. They put a face to an issue; they put a story to an issue; they bring our letters. In my class, we submitted a letter last year, talking about the issues that are important for people living up here in the (part) country to call.

Lisa disclosed,

Last year we were able to hire a lobbyist for the association, and he was so incredibly helpful. Not just with the individual issues that were coming our way, but with teaching me a framework for how to think about things. Basically what we worked on is, here's the mission for the Tennessee Counseling Association. And then as bills come through, we need to sort them according to oppose, support, or remain neutral. Or disregard. There were over 2,000 bills I think filed last year, and we monitored 200 of them. Which is a huge number. Most lobbyists are monitoring 10 to 15 for their clients, but because what we do is so broad, so many more bills touched what we do.

Josh argued that legislative professional advocacy can be difficult without a lobbyist. He said, *“I think not having that support would be tough to get things done, because I think there's the true inner workings of government that are very specific to each state, and also in regards to*

national advocacy, there's definitely nuances in regards to navigating government regulations as well as lobbying efforts."

Participants who were connected to leadership roles while acting upon legislative professional advocacy unanimously agreed that lobbyists were necessary for advocacy action. Connection is also fulfilled by collaborating with others towards advocacy action. In the following section I will discuss the next sub-theme of *collaboration*.

Collaboration. Advocacy action was eased by collaboration and partnerships with others who had experience with legislative professional advocacy. Josh processed how collaboration boosted the impact of advocacy action,

I think there's a lot one person can do, but I think we could probably do more as a collective voice. But I think in regards to setting those priorities, I think members of those organizations can be pretty impactful and can steer the ship essentially and be active in those organizations in regard to shaping priorities and agendas. So, whereas one person can make a difference in regards to moving an issue along, or getting an issue identified, or navigating an issue in an organization, I think as a collective voice, we'd make a stronger impact.

For Lynn, collaboration helped add perspective on legislative issues, *"I think having more than one perspective is always a good idea. No man is an island and no profession can operate on one idea either, and so we have to have a multitude."* Ava added that collaboration adds perspectives and prevents potential harmful advocacy,

Because sometimes people want to go advocate, and they don't know what they're doing, and they make things worse. So you want to get in the game, but you want to be smart

about it. So working collaboratively with other people who know the issues can really help that so that you don't fall in any holes or make any serious, harmful mistakes.

In addition, collaboration with others who had similar passions or knowledge about issues provided incentives for advocacy action. Blair described “rallying troops” and connecting with others with the same vision,

Rallying troops. Trying to find somebody else to get involved with me on it because more than likely, if I see it as something that needs advocacy, one of my peers, one of my professors, one of my colleagues, somebody else is gonna see it as advocacy worthy as well.

Collaboration also meant support to Mindy, “*I have colleagues who kind of are like minded and passionate, and so who will share talk about and support.*”

Many participants believed divisiveness in the profession compromised advancement of the profession and unity toward common issues. Participants argued that counseling leaders need to collaborate toward common goals, including development of a unified professional identity.

Lynn said,

But I just hate to see that kind of division in the organization, when really what we need right now is unity. And trying to, making sure that everybody's moving toward the same goal of obtaining a professional identity that everybody recognizes, and obtaining that ability to show the federal government, "This is how counselors are trained. This is what the counselors do. This is our scope of practice and it doesn't change from state to state to state." That's one reason why this bill is such a big issue right now, and why Medicare has been such a fight, because they haven't been able to locate what a counselor is anywhere, because it depends on who you ask. And that was not okay, and it's still not

okay. And so, the goals of trying to work towards that, and I think of then, a big part of a lot of these controversies that we run across in the last few years, within the profession. I think that's another issue that we have to look at as well.

Ava also argued that collaboration is needed to be effective advocates, You also have to be collaborative, you know I talk about this all the time. You have to work together and be on the same page in your efforts and what you're doing. We're so much more effective when we collaborate across lines with each other.

Nancy recalled an example where collaboration assisted with legislative professional advocacy,

And there's this bridging of TLPCA and TAMHCA, and forging some real relationships. And it took inviting Lisa Henderson to come to Knoxville and to speak for TLPCA and to recognize that they hold the charter and here we are too. And we don't have to be enemies. We can be collaborative. And so, as professionals, we're all doing our piece, wherever we are. And so recognizing her talents and skills, which is very much about advocacy and legislative work. And I was in DC with her this past summer, in July, for ACA leadership, and she's a dynamo on the hill.

Lastly, there are “strength in numbers;” collaboration increases visibility, momentum, and impact. Christy recalled her experience as a state organization president representing hundreds of people,

I just find it motivating, organizational level especially, the people listen to us, people listen to our organization. And so, when it comes to like, "Hey, we're trying to pass this nondiscrimination ordinance," and I decide, yes, let's put our name on it, it's because I'm motivated by the fact that people have listened to us before, and probably listen to us

more as an organization than they listen to me as an individual. If I put my name as an individual on that letter, it would not mean as much as me putting our organization's name on it, because it's backed by the 300 other counselors that belong to our organization.

Josh also agreed there is strength in numbers through POs. He said,
If we say we're a profession of 150,000, and 150,000 of those folks are involved with our professional organizations, it's going to lend a lot more credence to those organizations in regards to their influence as opposed to only 60,000 of the 150,000 being members of that organization.

Even outside of POs, Spike believed that collaboration provides “strength in numbers,”
From training I have had one related to (state organization) about advocacy, we understand that it takes only 25 contacts to a legislator to get them to change their mind. 25 in the (state) that is not too many. With over a thousand counselors in the state, if we could get 25 or 50 people to respond to my email, we can make a difference and we saw it happen.

All participants shared that collaboration with community stakeholders was essential for advocacy action. Collaboration helped participants to feel supported and increase their power of their voice. Advocacy collaboration can also extend to community representatives. Next, I will provide an overview of the sub-theme *knowing community representatives*.

Knowing community representatives. Knowing community representatives was imperative for advocacy action. Lisa proposed that advocates should know who their local, state, and national representatives are and should build relationships with local representatives prior to legislative issues arising. Lisa explained,

So it's not enough just to send an email or call the office and leave a message. The goal needs to be very clear that not only do you know who they are, and did you actively participate in either getting them there or replacing them if that's your political viewpoint, but regardless of who is sitting in that office, the goal is for them to know who you are and what you do. So that any time there's an issue related to something that you care about, you can pick up the phone and it's not the first time that they've heard from you. The thing that I hear over and over from people who know, folks who've been in this space for a long time and who really understand how to be effective here is that politicians are people first. Nobody appreciates the very first time they've ever interacted with someone, they're being yelled at and things demanded of them. So developing that relationship is the responsibility of the individuals.

Josh discussed that relationships assist in gaining support of representatives when legislative issues arise, “*knowing those legislators and what their priorities are is always helpful before going into a meeting.*” In addition, Lynn argued that building relationships with representatives can increase visibility of the counseling profession and foster potential partnerships between counselors and legislators. She said,

I think we need to advocate for more as well, is to help them understand, "Who are these people? And what do they do that's, and how is it different from psychologists, social workers?" That's, but sometime a difficult thing. So I think that's an important piece of the puzzle, is helping to develop those relationships with these people, so they will listen to us and ask us these questions, so we can educate them. So that when they do go to do legislation, some of them can say, "Hey, why aren't the counselors included in this?" That could be, because we can't sit there and do that, because we're not in legislature. We

can't say anything when we're in there anyway, even if we go to the meeting, but they could. They could say that, if they had that education, if they knew what going on, and if they knew what we do. So that would be a good way for us to be able to impact things, I think.

Participants who worked with community representatives shared the importance of establishing early relationships prior to advocacy action. Building relationship with community representatives facilitated visibility and efficiency. The following section I will cover the next tier in the Three Tiered Legislative Professional Advocacy Model: *Advocacy Action*.

Advocacy Action

The *Advocacy Action* tier represents the way participants decided and acted upon legislative professional advocacy. This tier is divided into two main themes: *picking your battles* and *making it your own*. Prior to acting upon advocacy, participants learned to pick their battles. The theme *picking your battles* consists of three sub-themes: *choose when to use the power of your voice, beware of political ploys, social justice advocacy and professional advocacy, and Negotiating barriers to legislative professional advocacy*. The *making it your own* theme includes two main ways participants acted upon advocacy: practical and direct advocacy. In the following section, I will describe each theme inside the *Advocacy Action* tier and provide participants' insights regarding each theme.

Picking your battles. Although rightful causes are worth advocating for, advocates learned to pick their battles by choosing when to use their voice, staying aware of possible political ploys, understanding the difference between social justice and professional advocacy, and negotiating barriers to legislative professional advocacy. In this section, I use participant narratives to explore how they picked the battles.

Choosing when to use the power of your voice. Leaders cannot advocate for all legislative issues that arise because it reduces the impact and effectiveness of advocates' voices. Advocates need to pick battles that are for the benefit of the profession, PO, its members, or their community. Lynn uses her voices when she thinks she can make a difference,

Filling my time is not a problem. I think the main thing is, in order to be able to be in a position to provide some influence, to be able to make a difference, both for the profession and for the people that we serve, I feel like that's ... If there's anything that I can do in order to be able to do that, then that's what I want to do.

Christy also explored picking a worthy cause,

So, choosing when to use the power of your voice so that it's the most effective. And I think that happens on both sides of the equation. And it's a very big system, and there's a lot of influence on those decisions, but I think it also comes down to those decisions.

When am I willing to speak up, and put myself on the line, and be willing to be associated with this issue, and when am I not?

She later added,

So that if something comes up that's like child abuse ... There was a law last year that was like harsher punishment for people with child abuse charges. So, one of our board members said, "Well, I'm going to be honest, this is something that's personally really important to me, but organizationally, is this a priority for us right now?" And we kind of said, "Well, I don't really think that's not going to pass, and it's not that we are for child abuse or anything like that, but we've got these other issues on the table," and that point, it was a bathroom bill that was on the table, that we really felt like we need to put our efforts behind more so than the child abuse one.

Lisa processed how making the decision of using her voice is difficult task,
And it's never an easy decision. It really forces you to take a look at everything that you believe, and how strongly you believe it. So one of the main things that we have to evaluate is can we win. If we can't, then we need to look at is it worth the fight knowing that we're not going to win, because some benefits can come from that, or is the fight actually going to leave us so damaged that it does long term damage to the association.

Across interviews, participants expressed how they could use to empower others, an organization, or a cause. However, participants shared they had to be careful with some causes. Next, I discuss the second sub-theme of *picking your battles* theme, *beware of political ploys*.

Beware of political ploys. While picking battles, participants noted that some legislative issues could be “fillers” as a method to make a political statement, with no real intention of making it past its sponsor. Prior to advocating, advocates should research the bill, its sponsor, and who else is supporting the bill. Lisa explained that looking at a bill’s sponsors assist in preventing harmful advocacy action,

Okay if nobody's picking this up, is that because this is just a political ploy? Is this somebody making a statement that nobody thinks is gonna go anywhere? And there was some of that. So getting consultation from folks who know helped me from really embarrassing ourselves, because there were a couple of bills that were put forth that even the sponsor didn't think was gonna go anywhere, it was just to make a statement. Like I remember, this was during the 2016 session, one of the representatives came into the House Health Committee, and went on this long presentation of her bill asking the 90% male committee members about, what if you went into the doctor and he told you that you were of poor moral character because you wanted to have sex. What if you

needed his permission before you could get Viagra if you weren't able to perform. They were all horrified, and at the end of ten minutes she was like, "Just wanted you to know what it feels like for a woman trying to get birth control." So that's an example of she wrote a bill that she wasn't in any way shape or form trying to pass, but just trying to make a statement. Now if we had jumped all over that bill in support of it, we would have been embarrassed, because it wasn't even a real bill. So trying to figure out if one of those crazy bills comes up and nobody's touching it, somebody knows that this isn't a real bill.

On the other hand, Lynn processed that even when there is an agreement between the advocate and a legislator, legislators can back up their word to make a political statement,

We figure out something is going to happen because this guy always has something up his sleeve. Last year, we went to him about this time last year, in the early February, and asked him about the potential for legislation that he was probably going to be introducing regarding the licensure boards and he said, "Oh, I'm not going to do anything. There's nothing in the works at all." Lied, because the very last day that he could introduce a bill, he introduced a bill that would have dissolved a number of boards and changed a whole lot of stuff that would have been very detrimental.

In this sub-theme, participants explored that they needed to do additional research about the bill and its sponsors prior to “jumping in.” Another component of picking your battles includes understanding the differences between the impact of social justice and professional advocacy. In the next section I will discuss the third sub-theme, *social justice and professional advocacy*.

Social justice and professional advocacy. Participants noticed a common division between social justice (what is best for the client) and professional advocacy (what is best for the profession). For Benito, this separation is not how he envisions legislative professional advocacy:

Legislative professional advocacy is about ... Unfortunately, it's been about legitimizing our existence as a profession. I think if we see what happened in Tennessee, if we see some of the ... I don't know how aware you are of some of the actions being taken in Arizona. There's this continual need to prove ourselves as a legitimate profession, that what we offer is of value. It's necessary, it's important, right? We need to prove why we exist, we need to prove the function that we serve. What I would like us to become more about is our clients and how our work serves to help clients, to protect clients, to empower clients.

On the other hand, Ava explained that separation is necessary for the development of the profession,

When you start to take on social justice causes, they're very, very big causes. I mean they're rooted in thousands, millions of years of injustices and complexities on an individual level, or on a broader organizational level, to take on some of these causes? And is that helping us as a profession? I would argue it's not. I would argue that we need to be more focused – from an advocacy perspective- on things that impact us directly in our professional lives... I would just say that I think it's a slippery slope. I think we have to be careful with social political advocacy. We need to make sure that we're being strategic and smart about it, and that we're considering the context in which we're operating.

Lisa discussed how a lobbyist helped her to focus her efforts,

I will say our lobbyist helped with that a lot. And he was trustworthy in that, because he is very much on a social justice end of the spectrum personally, but professionally he's not. So he was able to walk me through, "This is going to be unfair, this is gonna be unjust, this is gonna cause undue harm, but it's not gonna have any impact on your ability to do counseling. It doesn't impact your license, it doesn't impact people's access to care with a counselor," and that was really tricky to sift through, but he was really helpful in navigating that piece of it.

Participants also noticed that professional counselors are often more willing to advocate toward social justice than professional issues. Lisa discussed,

I'm very curious about increasing the robustness of our profession's ability to advocate for the work that we do. We are really good at advocating for our clients, and we're really good at going toe to toe with whomever need be. I've seen counselors do incredibly courageous and wonderful things with physicians, judges, school administrators, difficult parents, difficult children. But when it comes to advocating for ourselves, and our profession and our ability to practice, we really shy away from that.

At times, social justice and professional advocacy issues are at odds with each other.

Christy recalled a moment when her personal beliefs about social justice could affect the relationship she (as state organization president) had with the state representative,

It was one of those moments where I had to choose to keep my mouth shut, because there would be no benefit to disagreeing with this person who's about the sign on to a bill that helps my profession, but I personally disagree with everything that he said. So, it's this really interesting system of putting, as an advocate, putting forth parts of yourself that

are important to the cause, and then, in my mind, this is certainly not for everyone, kind of being able to hold onto the parts of myself that don't fit in that moment, so that I can promote the cause that I'm promoting.

In the long run, some participants believed that advocating for some social justice issues could cause more harm than good for the profession. Christy further processed,

I could've damaged a system that's bigger than just me and my own system. Like my own set of beliefs was not as important in that moment as acting on behalf of my professionalism. So, sometimes it's about making choices. I think it's a lot about making choices. Like, the advocates making choices about who to approach, and when to approach them, and what to promote, and when, why, and how much effort to put into this issue versus that issue.

Ava disclosed that is not only preventing harm for the profession, but examining who benefits from the advocacy action,

But who benefited? (organization) got to get people who are people excited about like, oh, "social justice." But in the end, did they change anything? Did anything come out of this? Did anybody benefit? And if the answer is no, then I would argue that wasn't a very good idea.... So considering the context in which you're operating, I think that's so important. But I also think it's like, you have to be very careful, especially when you get into a legislative arena, things are fierce, they're ferocious, absolutely ferocious.

Holistically, participants shared that picking battles in legislation is important. Advocates should take into consideration the long-term impact of their advocacy action and the use of their voice. Participants also had to learn to pick what barriers to fight against. Next, I will discuss how participants negotiated picking their battles based on the barriers they faced.

Negotiating barriers to legislative professional advocacy. Leadership and advocacy are often done in volunteer positions. Although participants had the desire to act upon legislative professional advocacy, they had to negotiate what barriers to overcome and what barriers to accept. The most common barrier to advocacy action was lack of time. Blair explained, *“I think that that might be a challenge, and I don't know if that's a question that comes up later, but I feel like that can be an issue is finding time for people to help engage others to be a part of the process.”* Joe also processed,

I think for me it's all about time and resources. If you're going to go on the Hill or if you're to go to some of these trainings... I have some limitations. I don't own a car in (state). So to get over to (other state) is not easy, to be with (person's name) one-on-one. So, yeah, I think there's some significant time, energy, resources, monetary resources that prevent me from being a stronger advocate.

Job demands often limited how much time participants could spend advocating. As a counselor educator, Daniel's job demands limit his time to advocate,

In part, I'm guilty of the same kind of things that a lot of counselors get guilty of, which is that I'll see a call to action and maybe I'm just too busy to deal with it. For example, we're coming up on finals week right now. If some big something came out right now, I'm not likely to be paying as much attention to it. That's not necessarily a good thing, but I only have so much time.

Not all participants lived near the capital where they could meet with their representatives, therefore limiting the types of advocacy in which they could engage. Spike illustrated,

It's a volunteer person and part of the issue of the way the (state) legislature work, is rapid-fire fast because it only meets for 44 days I think in the general session and 30 days in the one session, and so, it might be say at 4:00 in the afternoon they decide, "Okay. Such-and-such bill is going to be considered by this committee tomorrow at 8:00 in the morning." Then it gets posted in their website, but we need to have people near (Capital of the state) or specifically (Capital of the state), (city in the state) who can be there for that meeting at 8:00. It takes nine hours from one end to next of the state. It's not always possible to be physically there.

Lastly, job affiliations limited participants' willingness to advocate for certain causes. Fear of losing their jobs or being portrayed a certain way caused participants to not act upon certain issues. Christy explored the power that her job has over her advocacy action,

So, that's probably a piece of it, is you know, if I do something in public, and and in some way associated with the university, and the University decide that they were not happy about that, they have a lot of power over my life.

Similarly, Mindy discussed feeling trapped,

So I will say at times I feel a little bit trapped. I am a state employee, so I have to be careful about using my voice, because I am a state employee. Like even when we have a day on the hill, and one of my colleagues went, and my colleague talked about really feeling she could only say so much, because she was representing our university. And I think that at times can become challenging. Particularly in this climate where more universities are kind of cracking down on Twitter and all of those things.

Roadblocks to legislative professional advocacy were often external. Time, money, and job requirements and restrictions were barriers participants processed as having no control over.

Lack of control often left participants feeling helpless and frustrated due to their inability to commit to advocacy action. However, participants shared that negotiating barriers was a way to pick their battles. After deciding which “battles to pick,” participants acted on an advocacy need. In the next section I will provide an overview of the second theme in the *Advocacy Action Tier*, *making it your own*.

Making it your own. Legislative professional advocacy does not have to look the same for everyone. Participants used different tools in order to act upon legislative issues. Jason, Blair, and Mindy argued all types of legislative professional advocacy are necessary. Jason said,

We need all those actions at all the different levels that occur; everything from a petition sign, phone call, to letter-writing, being the bill-constructor, or working at the level of leadership where you're knocking on your local representative and state assembly's doors to find sponsors for the bill. We need all of the above.

Blair discussed, “So I think my advice would be find what you're passionate about, find your cause, slash causes, and be open to how activism and advocacy can look and be willing to roll with it.” Mindy explained, “I think, show up. And if you're really passionate about something, do what you can.”

While acting upon legislative professional advocacy, participants used two main types of advocacy: Practical and Direct. In the following section, I will describe the first sub-theme of *making it your own: practical advocacy*.

Practical Advocacy. Practical advocacy entails all types of advocacy that does not involve in person contact with stakeholders. This may include emails, postcards, phone calls, and social media. Jason defined practical advocacy as “in terms of making phone calls, signing

petitions, writing letters, building it into my syllabus, raising student awareness.” Ava and Spike shared how they used practical advocacy as PO leaders. Ava explained,

So we got electronic voter voice, like these electronic systems that we set up so that we could send out emails to people, and say, "Hey, all you have to do is put in your name and email, and it'll shoot off to your representative," so again, I think that practical piece is super, super important.

Spike said,

Last year (state) had a bathroom, anti-transgender bathroom bill that came up and we managed to squash. People in the state managed to squash it. It never even made it out of committee. Again, because of massive numbers of people emailing and calling their legislators.

She later added,

Well, good email list is what we use but social media is the other thing and that wasn't quite that popular when I was doing it in 2014. I think Facebook and Twitter are going to be more important lately than email. I think it's important in all areas I mean to get, to use all methods not just rely on one.

Although all types of advocacy can make an impact, participants reported that phone calls and social media had better results. Josh explained that out of practical advocacy choices, phone calls are the most effective,

I think the face to face contact as well as calling are probably more effective than emails and letter writing. And I think there is ... we have had presentations with various lobbying firms that have shown those to be more effective in regards to communication. Sometimes these legislators, whether they be at the national or local level tend to get a

lot of communication, and it seems like the ones that stick a little bit better are the ones where they get to talk to somebody. And so phone calls as well as personal visits.

Similarly, Lisa explained that emails were often treated as spam,

By far in person is the most effective. Second to that a phone call where you can have a conversation is also effective. Emails, I go back and forth on these because some people go so far as to say don't do it at all, because they get treated as spam. That is becoming more and more true... Because of the technology capabilities of blasting out spam emails, they are actually looking at emails as they're not even real. So they can't, if you send a form email that you just pressed forward, and filled in your name and theirs, then they don't know if you a human did that or if a piece of software is doing that on robo. So they're not being considered at all.

Lynn also illustrated the importance of phone calls and social media,

Well, I've heard several theories on this. And many of them have been true. I actually heard that phone calls are probably more effective than emails. Because you can imagine how many emails they have to slog through in a day. They probably don't even read them all. But a phone call, they can actually listen to the message and hear what's going on, and that kind of thing. That's where I've heard that is more effective. I've also heard that if you get on their Facebook site and talk about things, because that is a public venue, if you start calling them out on something on their Facebook site, they're much more likely to pay attention to that. Because it is a public issue, and the people will see that and it will affect their popularity. It will affect their approval rating, all of those kinds of things. And so, whatever other kinds of social media sites they might be on, Twitter or whatever else. And so, I've heard that that can be an effective venue as well.

All participants reported engaging in at least one type of practical advocacy. Emails to state representatives were reported the most often. However, they reported other methods such as phone calls and social media postings as more effective. Next, I will cover the next sub-theme of *Advocacy Action: direct advocacy*.

Direct advocacy. Direct advocacy involves in-person advocacy action. Direct advocacy can be having a meeting with a representative or staff member or working with lobbyists or representatives at the capitol. Christy recalled her experience with direct advocacy, *“meeting with our Senator over the summer, on behalf of (organization), he talked about Medicare coverage for LPCs, because our senator is sponsoring the bill in the Senate.”* She later added,

The folks before me, they drove down to (state capital), they drove down to the state legislator in a budget making year, and said, "Hey, people are dying everywhere. Like, (state) has been in the top five suicide rates of any state in the country for the last six or seven years. People are dying, because there aren't enough counselors in this state. And so, we need to be able to offer training to people in rural communities who can't drive down to (capital), because that's the only counseling program in the entire state," so if you live anywhere but (capital) essentially, you can't get trained as a therapist, unless you're giving your money to an online program in another state, and that's not what you want. And so, they drove down, and they advocated, and they got some of the local representatives to sign on to it, and they agreed. They said yeah. I mean, this could really help. And so, my job is literally a line item in the state budget.

Spike provided another example for direct advocacy as president of a state counseling association,

At the time the rule was, the law I guess, the law was, that counselors could not bill for Medicaid, only doctors and psychologists, and so, what was happening is private practice counselor would provide mental health services to a client. Then, for a price for a percentage a psychologist or a medical doctor would sign off on their Medicaid Billing....I happen to work with a state senator who worked at the college and I made an appointment with him and brought in these two private practice counselors and we said, "This needs to change. Are you willing to help us get a bill through the legislature?" He thought it was worthwhile.... We are fortunate that our secretary lives in (capital of the state). She was able to testify at committee hearings and rally some folks in the (capital of the state) area to testify, bill pass on committee and it went through those three votes in the Senate, three votes in the House and it got passed.

In addition to collaboration with legislators, participants reported two main events that helped with direct advocacy action: "Days on the Hill" often organized by POs and the ACA's Institute for Leadership Training. Joe explained, "*basically, a lot of the professional organizations have Hill Days, in (state), where people come, and they learn how to do advocacy work and meet with senators and representatives on the Hill.*" Nancy described her experience with "Days on the Hill,"

I've been to the hill twice with AMHCA and once with ACA and they really ... It might seem like they don't really want to hear from you or they don't care, but they kinda do. And we really do represent what we do. And so story ... Just telling your story. What you do. Sometimes the staffers who might be very young and you might not think that they really understand what you might be trying to say ... They do, but if you tell a story, or ask them.

Sunny reported that her CSI chapter used “Days on the Hill,” to promote advocacy, *That CSI chapter now does an annual day at the hill. They were able to, I kind of look at that CSI chapter and think about how there needed to be more flexibility and structure, and that supported the organization and its leaders to have more stability and sustainability and that's then allowed there to be greater advocacy, we could say both social and political.*

The ACA’s Institute for Leadership Training is offered every year and often accessible to leaders in ACA, its divisions, and its state branches. ILT is required for presidents and president elects of ACA divisions and state branches. Karen explained,

I don't know if you're familiar with the Institute for Leadership Training that ACA does in the summer? ... so that was when I was president-elect of (organization), I got to go to that training ... I went to like a one day training on the state level with that group and then we went and did some, some advocacy, uh, like at the Capitol as well. Um, I actually haven't gone to the local office of a Senator or a Representative before, that's the one thing I have not that level I have not done and I would like to do. Um, but I've always done it in groups, I haven't ever done it by myself either and I think that has made a difference as well. I was a part of some bigger group that organized, um, events and part of a training and I got training every time before I went. Um, and I went with someone that had done it before and that really helped. And I like doing that now that I'm the person that's done it before, and I'm able to support other people to do it and to see that they can and that kind of thing.

Sunny recalled her experience with the ACA’s Institute for Leadership Training as her only training on legislative professional advocacy,

I think really the only formalized training that I had was that was associated with ACAs institute for leadership training, because they call it ILT, Institute for Leadership Training. They actually do walk you through how do you sit down and talk with an elected official? How do you give your three minute elevator speech? What is most important? There is some actually training associated with it.

Direct advocacy allows professional counselors to build connections with state and federal representatives and increases collaboration between the profession and the government. Lisa explained;

Everybody's busy, so nobody's impressed that you couldn't make an appointment with them because you're busy. Everybody's busy. They all have full time jobs, and they do this as a part time gig. They make \$19,000 a year to be in their elected positions. They are not sympathetic to being busy, and I can understand that. So if you really cared you would have carved out the time to have a conversation with them about it.

Direct advocacy assisted participants in building relationships with state and federal representatives and advocating for the profession. For both practical and direct advocacy, participants explained that advocates have choices available for them in terms of types of advocacy that fits their knowledge, identity, and values. Participants reported all types of advocacy are important. Next, I will cover the third tier in the Three Tiered Legislative Professional Advocacy Model, *Advocacy Training*.

Advocacy Training

Training on advocacy is limited. All participants reported having none or limited training in leadership, advocacy, and legislative professional advocacy. Due to this lack of training, participants reported that training should be aimed to *demystifying legislative professional*

advocacy. To demystify legislative professional advocacy, there needs to be a better understanding about the legislative process, self-directed learning, and hands-on learning. In the following section, I will describe this theme inside the *Advocacy Training* tier.

Demystifying legislative professional advocacy. The legislative process can be intimidating. Participants reported that their first time advocating for/against policy was overwhelming and nerve wracking. However, Ava assured that it is not that intimidating,

I find counselors are very intimidated by legislative advocacy, and more than anything I just want to communicate that it's really not that intimidating, and you don't have to understand the nuts and bolts and details of the government and legislation in order to be good at it.

Sunny learned that action is simple once one has foundational knowledge about the legislative process,

A lot of individuals only think about the grand scale gestures, and so that can be very nerve wracking for some. I think that these types of events can be very empowering once people have participated in them, to have a better idea of what it means to advocate at the large scale. I think it also can give more clarity to how it doesn't have to be at the large scale, but even going to something that is like ACAs ILT, you can then take that experience and bring that back to that level too.

Josh and Daniel explained that although legislative professional advocacy is not intimidating, it can be arduous. Having a better understanding about the legislative process helps advocacy action. Josh explained,

It's very hard to get things done (laughs). It's very hard to ... I think, you know, in our government, whether it's state, or local government, or national government, it's really

the folks with the most resources, or the way they utilize those resources, in a way to capitalize that are getting things completed and done. I think there are a lot of competing priorities, thousands to maybe a 100 things that might actually get complete from start to finish. So, I think one thing that I've learned is it takes a lot of patience. Yeah, it takes patience, is probably one of the things that I've definitely taken from that and coaching folks to realize not to be dejected when things don't always work out, and the fact that you kind of have to keep going at it over and over again sometimes until something gets completed.

Daniel discussed,

And I think one of the challenges for people who don't necessarily, aren't necessarily involved with understanding the political processes ... As an example, the Medicare issue, we've been actively working on trying to change legislation to get counselors approved as providers for Medicare for the entire time I've been in this career; long before I did anything to get involved, and then since I've been involved. That bill makes its way through Congress or the Senate, and then it dies, and then we have to start over again next year. You can have success in terms of getting people on board, moving it through, and then it can die and you go back to square one. I think when people don't understand that that's how the legislative process works, they feel defeated and want to give up. We have to keep on bringing it, and bringing it up, and bringing it up until it eventually gets through.

Understanding the legislative process can be facilitated by collaboration/mentorship, self-directed training, and hands on training in counselor education programs. In the following

section, I will discuss the first sub-theme in *demystifying legislative professional advocacy: collaboration/mentorship*.

Collaboration/mentorship. The legislative process is complex and not common knowledge in the counseling profession. Ava illustrated,

You also have to be collaborative, you know I talk about this all the time. You have to work together and be on the same page in your efforts and what you're doing. We're so much more effective when we collaborate across lines with each other.

During the interview, Sunny shared that she has her own acronym for her advocacy practices “ACE”. She explained,

The first thing that I think of is not taking it all on by myself and that kind of goes back to my ACE thing of advocate, collaborate, and educate. How can we advocate through our ability to collaborate, since that is something that we are trained to be good at as counselors is to collaborate with others and consult, and then utilize that as the opportunity to educate and then that advocacy kind of comes full circle if you're doing those three things.

Mentorship was a vital resource for Joe,

I think the support that I have has been mentors. That's primarily been a student in my program who recently graduated and took a faculty position. He was somebody that was really passionate about advocacy and leadership. So having a fourth year doc student spend a significant amount of time mentoring me in that way was really helpful.

Participants were able to understand and learn nuances of the legislative process by partnering with lobbyists or other community mentors with legislative knowledge.

Daniel illustrated,

There were issues that came up on a fairly regular basis, hmm, whether it was proposals for changes to the law or issues that were being raised that we wanted to address. In those roles, I worked with our lobbyists to both understand what was going on, but also when they would bring issues to our attention, then I would be involved in both communicating that information out to our members and sending out calls for action to XCA members and working in that regard.

Josh and Lisa explored how lobbyists may assist with educating about inner workings of government. Josh said,

At the state level with NYMHCA as well as at the national level with AMHCA. We've had, at least at the national level, we have a full time public policy person as well as the help of a lobbyist. And then at the state level, we have full time staff that help direct that, but also we contract with lobbyist for certain issues... and it helps to have folks that are very familiar with those processes and procedures to help you get in the door, and talk to the right people, and kind of shape your messaging, and have them also represent you from time to time when you're not able to be present at certain things.

Because legislative advocacy can be a long and arduous process, collaboration helped participants understand the importance of celebrating “small wins.” Along the way, participants learned about advocacy through collaboration, mentorship, and self-directed training. In the following section, I will discuss the second sub-theme in *demystifying legislative professional advocacy: self-directed training*.

Self-directed training. Due to the lack of formalized training in counselor education programs, participants learned about legislative professional advocacy action by doing the work and through trial and error. Christy shared,

To be honest. I learned about systems, but it's not really something that I was taught about, it's just something I'm kind of figuring out as I go along. I'm learning more from the other people, and working with them.

Similarly, Joe processed his own lack of training, *“so I've never had any formal training. I think it's all been self-directed learning. I'd love to someday get some more training regarding how you lobby, things like that. But yeah, no formal training I don't think.”* Blair's training was experiential *“really no formalized, actual training that I can think of besides of my experiences working.”* Daniel shared a similar experience,

I didn't have any. There was no point in my educational career, in my master's or my PhD, where I received any kind of training that had anything to do with advocacy. So, in effect, my training if you will, was on the job training. As I got involved with things, then I learned by being told, "Okay, this is what we need to do," and then I would do that. It was just kind of learn by doing.

Most training received in leadership and legislative professional advocacy was primarily outside of counselor education programs. Spike engaged in training through workshops outside of counselor education *“In 1995, I went to a training called Fighting the Far Right, and learning this was how to present oneself to the media and watching for issues that concerns, some of it was LGBTQ but it wasn't totally LGBTQ issues.”* Josh's training in leadership and advocacy came from ROTC,

I think where my leadership style or where it was developed was actually in my undergraduate years. I was in, uh, what's called the ROTC, the Reserve Officer Training Course. I was in the Army ROTC basically going on a track of becoming an officer in the military. But due to physical circumstances I wasn't able to complete that program, but

that program was very heavy in regards to teaching, you know, leadership styles, and leadership goals, and what it is to be a leader, and how to be a leader.

Sunny sought leadership and advocacy training during her doctoral degree, but the training was outside of counselor education. She described,

I took coursework that was outside of not only our department, but also outside of the college of education, which I found very, very refreshing. University of (state) has a master's and a PhD in leadership development that is housed in the agricultural education and communication department. I was able to take courses that we could qualify them as being interdisciplinary. Most of the people were from their own program but they took outside people like myself. I took courses in leadership theory. I took a class in human dynamics in leadership. I took an organizational leadership course. I think that those courses and the experiences that were embedded into that really are strongest in what shaped my understanding of leadership in the much broader sense that there is beyond just the positions that we serve, which is what's known in our profession.

In all, participants had the passion to seek out additional training or learned about legislative professional advocacy while “on the job.” Although participants learned on the job, they often believed that hands on training in counselor education programs is needed. In the following section, I will discuss the third sub-theme in *demystifying legislative professional advocacy: hands on training in counselor education*.

Hands on training in counselor education. Hands on training in master’s and doctoral counselor education programs is needed to demystify legislative professional advocacy.

Participants believed programs should either have a stand-alone class in leadership and advocacy

where legislative professional advocacy is addressed or infuse legislative professional advocacy in several courses. Benito explained,

It's got to be a component of counselor education. It's just not right now. I think I had a class on like advocacy and policy, but it ended up being more about like social justice, and social justice counseling than it was about actual tools. So I think if we were to kind of think about this as like an expansion, I think you would have to be around developing text resources that could be disseminated to counselor education programs to be able to implement.

Mindy also believed it was necessary to add an advocacy course, “I think we should have an advocacy course. I think, even if it's not like a three credit, full semester course, I think students should be required to do advocacy.”

Training in legislative professional advocacy must be “hands on.” Participants suggested that programs teach students how to do the whole process, from identifying an issue that needs advocacy to applying practical and direct advocacy action. *Jason argued, “the training needs to involve real-life projects. At least, that's, I think, what needs to happen. I'll be curious to hear what your other, your co-participants say about that assumption.”* Similarly, Nancy discussed,

Hands-on training. Service learning. Activities. Ways to get people involved in community service. And bringing it into the classroom through the internet and through ways of bringing in technology to bring issues in through YouTubes and clips and interviews and people. Also, using human capital and bringing in resources and people to speak about ... Cause that's what students like, too.

Jason illustrated, “well, I think it's got to involve hands-on projects. I think it's got to involve an experience of them actually doing it.” Ava discussed,

Including it, having it in the curriculum, being hands on, think the best way to learn advocacy is having people go talk to their senators and representatives. Even if it's just at their local offices, it doesn't have to be at the capital or in Washington, D.C. right? It could just be at their staff with a staffer at a local office. So I think that really hands-on, doing it, it's one of those things like government advocacy, legislative advocacy is one of those things that you really need to do it to wrap your head around it and get comfortable with it, and realize that it's not that intimidating.

Participants proposed that programs can partner with POs to go on “Hill Days.” Karen explained, *“I think partnering with your state organization, um, is really helpful like having the university partner with a state organization so that they don't have to do it independently.”*

Across interviews, participants all argued that hands-on-training was the best way to demystify legislative professional advocacy. They believed that by providing hands on training in master’s and doctoral programs, students would be more prepared to face legislative professional advocacy after graduation.

The Three Tiered Legislative Professional Advocacy Model explained in this section encompasses the “why” “how” and “what” in advocacy. By using participants’ experiences, this model outlined what motivated advocacy action, types of advocacy action, and how to improve training in advocacy. Although all participants had resources that helped them persist, they also experienced barriers they had to negotiate as they picked their battles.

Summary of Results

Due to the lack of training and research in legislative professional advocacy, participants in this study adapted themselves as advocates, created their own definition of legislative professional advocacy, and learned to make advocacy their own. Participants made advocacy

their own by exploring how the advocacy need matched their identity and values. In addition, participants used strengths and traits to act upon the type of legislative professional advocacy that felt genuine to them in their specific context. Along the way, participants found connection with POs through leadership or membership. POs helped participants use their voices through collaboration. Mentors, community stakeholders, and experts in legislative professional advocacy were also sources of connection for the participants, empowering them to act upon legislative needs.

Being counseling leaders helped participants discern that although all rightful causes are worth advocating for, they should use their voices as advocates carefully. Advocating for all issues could cause more harm than good and dilute the power of their voice. Therefore, some reflection is needed prior to advocacy so advocates can discern the benefit and achievability of the proposed advocacy action. The processes of legislative professional advocacy were primarily self-directed or managed through ACA's resources, suggesting that additional training is needed. Along the way, participants negotiated barriers of lack of time, resources, and fear of job loss. These barriers made legislative professional advocacy difficult to do. Nevertheless, participants stepped up and persisted.

This chapter described results of a constructivist grounded theory study using fifteen semi-structured interviews with counseling leaders who engaged in leadership related to legislative professional advocacy. I provided an overview of the four major themes of the advocacy process, *connection to personal and professional identity*, *use of personal and professional community*, *making it your own*, and *picking your battles*. The four major themes were divided into three main sections: *Advocacy Catalyst*, *Advocacy Action*, and *Advocacy*

Training. In addition, I covered one theme that was outside of the process of legislative advocacy but was important to note: *Defining Legislative Professional Advocacy*.

Chapter 5: Discussion, Implications, and Conclusion

The purpose of this study was to explain the process of legislative professional advocacy for counseling leaders in hopes of improving understanding of legislative professional advocacy and influencing training of future counseling leaders and advocates. The research question guiding this study was: *what is the process of social/political professional advocacy for counseling leaders?* In chapter four, I provided an overview of findings after analysis of 15 interviews with counseling leaders. I presented participants' definition of legislative professional advocacy. I also explored the three tiered approach to legislative professional advocacy which included *Advocacy Catalyst*, *Advocacy Action*, and *Advocacy Training*. Within these three tiers, participants made advocacy their own by exploring how the advocacy need matched their identity, values, and community. In addition, participants learned to pick their battles based on the needs of the profession, their communities, and barriers they could overcome.

In this chapter, I connect findings with literature regarding legislative professional advocacy. In addition, I discuss limitations of this study and implications for research and implementation of findings.

Discussion

There is a plethora of research regarding advocacy practices. However, there is limited research on professional advocacy and even less on legislative professional advocacy. In addition, most research on advocacy is conceptual and not based on empirical findings. This study helped increase understanding about how counseling advocates engage in legislative professional advocacy. In this section, I discuss how key findings of this research study relate to previous literature regarding advocacy.

Definition of Legislative Professional Advocacy

Given the limited research and clear definition of legislative professional advocacy, participants interviewed early in the data collection seemed to be unsure about what social/political or legislative professional advocacy entailed. After the third interview, I started asking participants how they defined legislative professional advocacy. The coding team created a definition using an aggregate of participants' responses: *Advocacy related to legislation to improve or change policies that impact the counseling profession, clients, and the counselor's ability to practice.*

The drafted definition matched portrayals of professional advocacy by McKibben et al. (2017) and CSI (2017) by addressing that the target of advocacy is professional practice and policy that affects the profession. This definition also corroborated the goal of targeting legislation that limits professional counselors' ability to practice (Lewis et al., 2002; Tate, Lopez, Fox, Love, & McKinney, 2014) or is harmful to client welfare (Ratts et al., 2010; Singh et al., 2013).

This definition bridges the divide between focusing on professional issues or client welfare. Limiting counselors' ability to practice, receive reimbursement, or provide services to their community directly impacts the welfare of clients by restricting access to critical counseling services and further stigmatizing mental health aid.

Agreeing on a definition for legislative professional advocacy is the first step toward better comprehending the legislative professional advocacy process. The second step is to increase understanding of what motivates advocates towards action. In the next section, I discuss advocacy catalysts of legislative professional advocacy.

Advocacy Catalysts

Participants described *Advocacy Catalysts* which connected with an advocacy need and fueled their advocacy action. Using a combination of personal and professional identity and community, participants found a way to make their advocacy meaningful. In the following section, I will describe in more detail what helped participants feel motivated towards advocacy.

Connection to personal and professional identity. Personal and professional connection through values and identity was a core finding of this study. Participants had to be personally or professionally connected to the advocacy need in order to act upon legislative issues. Passion and connection incentivized advocacy action and supported advocates through the arduous process of legislative professional advocacy.

This study confirmed the importance of personal connection in advocacy and self-exploration conceptually theorized by Ratts et al. (2016), Lee and Rogers (2008) and Schmid et al. (2008). Unique to this study and not appearing in conceptual literature or models (e.g., Lewis et al., 2002; Lewis, 2011; Ratts, DeKruyf, & Chen-Hayes, 2007; Stewart, Semivan, & Schwartz, 2009) was the role connection to personal and professional identity played as an advocacy catalyst has not yet been discussed by none of the conceptual models of legislative professional advocacy in counseling or in the *Advocacy Competencies*. This appears to be the first empirical support for this finding in the professional counseling literature and provides a unique insight of what motivates advocates towards advocacy action.

Knowledge and experience acted as advocacy catalysts when participants felt they had the expertise to communicate why advocating for that particular legislative issue was important and how it affected the profession and their clients. This study empirically supported prior conceptual literature by Ratts et al. (2007) who argued that advocating for an issue with lack of

knowledge and expertise can damage the advocate's credibility and reputation, sometimes harming the advocacy goal. The ability to prepare convincing data needs expertise and knowledge from the advocate. In addition, this finding also empirically supports the conceptual action step found in the *Advocacy Competencies* (Lewis et al., 2002) "prepare convincing data and rationales for change" (p. 3).

Lastly, participants used personal characteristics as sources of motivation and strength through advocacy practices. Participants discussed introversion, extraversion, persistence, commitment, and leadership skills as examples of personal characteristics that supported their advocacy processes. This finding empirically supports conceptual claims by Lee and Rogers (2008) and Young, Dollarhide, and Baughman (2016) who argued that leadership characteristics were fundamental to advocacy action. Unique to this study was how participants used personal characteristics outside of leadership traits to fuel advocacy action. Specifically, participants used personal characteristics as a source of connection to the advocacy need, as an asset to persevere through the hardships of legislative professional advocacy, and as tools for building collaborations and relationships both within and outside the profession. Alongside personal characteristics, participants used their personal and professional communities as catalysts. Next, I discuss *use of personal and professional community*.

Use of personal and professional community. Participants' communities played a pivotal role in legislative professional advocacy. Participants often stepped up and acted towards legislative issues when there were opportunities for advocacy or connection in their communities or POs, especially when collaboration with stakeholders and mentors was available. This finding empirically confirmed conceptual claims that legislative advocacy is only effective through collaboration (Feldblum, 2003; Lee & Rogers, 2008; Lewis, 2011; Lewis et al., 2002).

Although collaboration can happen with any member of the personal or professional community, participants unanimously shared that most of their collaboration was with POs. POs provided connection to others with similar passions, opportunities for leadership and advocacy, and information about legislative issues at state and federal levels; POs also acted as a conduit between the government and PO members. The empirical finding of the significance of POs is consistent with conceptual literature that stresses the importance of partnerships with established community organizations (Feldblum, 2003; Hof et al., 2009; Lewis, 2011; Ratts et al., 2007). In addition, CSI's (2017) *Six Advocacy Themes* and CACREP (2016) standards stressed that counselor education programs should build relationships with POs and encourage students to join and collaborate with POs.

Collaboration can also happen between PO leaders and lobbyists. When participants were in PO leadership positions, partnerships with professional lobbyists assisted them to identify legislative professional advocacy opportunities and understand the legislative process. Not all POs had the budget to afford to hire a full-time lobbyist. However, participants argued that POs needed to have a lobbyist on staff or as a volunteer. The use of a lobbyist in advocacy action is conceptually supported by the *Advocacy Competencies* that outline as one of the steps towards legislative advocacy to collaborate “with allies, lobby legislators and other policy makers” (Lewis et al., 2002. p, 3). In the law literature, Feldblum (2003) argued that community organizations should partner with lobbyists who know the rules, culture, and procedures of legislative policy. This study empirically validated the need for collaboration with lobbyists for successful advocacy action presented by previous authors (Feldblum, 2003; Lewis et al., 2002).

Connection and collaboration with community members include establishing professional relationships with community representatives. Building relationships before and after legislative

professional advocacy action is pivotal to success in legislative advocacy efforts. By having working partnerships with legislative community representatives, advocates, their POs, and the counseling profession can increase the power of their voice, credibility, recognition, and potentially prevent harmful legislation being introduced. This finding confirmed conceptual literature that emphasizes the need for advocates to connect with state and national representatives (Almog-Bar & Schmid, 2014; Barstow & Holt, 2011; CSI, 2017; Lee & Rogers, 2008; Lewis et al., 2002). Once participants felt connected and motivated toward an issue that required legislative professional advocacy, participants moved towards advocacy action.

Advocacy Action

Advocacy Action represented the way participants decided and acted upon legislative professional advocacy. Prior to acting upon advocacy, participants learned to pick their battles. Once a battle was picked, participants made advocacy their own. In the following section, I discuss how participants described their advocacy action and how they decided when to use their voice as advocates.

Picking your battles. Advocates have the opportunity to use their voice for all causes that affect the profession and its clients; however, participants shared that some battles are not worth fighting. Advocating for all issues reduces the impact of advocates' voice, credibility, and effectiveness. Picking legislative battles is partially represented in the *Advocacy Competencies* as one of the steps towards social/political advocacy as “distinguish those problems that can best be resolved through social/political action” (Lewis et al., 2002, p. 3). However, this study identified participants' decision making process and consideration of their power as advocates not previously found in the counseling literature.

In addition, advocating for issues that are politically divisive could cause harm to the profession in the long run. Advocates reported that they weighed benefits and consequences of advocacy action prior to acting on legislative issues. This finding empirically confirmed conceptual recommendations by Ratts et al. (2007) and Lee and Rogers (2008) who explained that advocacy for social justice issues could have consequences. The authors argued that advocates should examine possible outcomes prior to advocacy action.

Politically divisive legislative issues could also be “fillers” designed to make a political statement, with no real intention of making past a sponsor. Prior to advocating, participants spent some time researching the bill and its sponsors noting that failure to research a bill prior to advocacy can harm the advocate’s credibility. Although this finding is consistent with literature that suggests rushing or engaging in uninformed or misinformed advocacy efforts can damage advocates’ reputations (Barstow & Holt, 2011; Lee & Rogers, 2008; Ratts et al., 2007), no other study in the counseling literature has empirically represented advocates’ roles in discerning political ploys.

Participants also picked their battles by negotiating which barriers to overcome. Because their advocacy efforts were often volunteered, participants faced barriers of lack of time, job demands or limitations, finances, and lack of resources. Participants persisted through many barriers in order to act upon legislative issues; at times, they picked their battles by accepting some barriers that were difficult to overcome. Although persistence was a characteristic of successful advocates identified by Young et al. (2016), advocates’ negotiation of barriers as part of their decision making was unique, not found in other counseling advocacy literature. Once advocates decided on which battles to pick, participants used different tools to act upon legislative issues. In the next section, I discuss the next finding of *making it your own*.

Making it your own. Legislative professional advocacy can be achieved multiple ways and does not have to look the same for everyone. Making it your own is represented at some degree in the *Advocacy Competencies* as one of the steps towards legislative advocacy as “identify the appropriate mechanisms and avenues for addressing these problems” (Lewis et al., 2002, p. 3). However, this finding goes beyond the current literature by further explaining that advocates used their strengths and knowledge to act on legislative professional advocacy in ways that felt meaningful.

Participants found that they could use their voices via practical or direct advocacy. Practical advocacy entailed all types of advocacy that did not involve in person contact with stakeholders (e.g., emails, postcards, phone calls, and social media). This type of advocacy is frequently used by ACA and other POs by sending legislative alerts and guidelines how to email or call legislators. This finding is the first to empirically describe different types of professional advocacy within the counseling profession specifically. In addition, participants reported that phone calls and social media were the types of practical advocacy that, in their experience and knowledge, had better results. This finding empirically confirmed conceptual literature by Barstow and Holt (2011) who argued that individualized phone calls, postcards, and messages had stronger influence than form or robo emails.

Participants also engaged in direct advocacy via in-person contact with legislative stakeholders. Direct advocacy can be having a meeting with a representative or staff member or working with lobbyist/representatives at the capitol. Although this type of advocacy could be overwhelming for participants, they reported this was by far the most effective way to use their advocacy efforts. Direct advocacy increased collaboration and connection with legislative stakeholders and increases recognition of the advocate and the profession. This finding

confirmed reports that 60% of legislators reported that in-person visits from their constituents had the strongest influence in their decision making (Barstow & Holt, 2011).

The ability to make legislative professional advocacy their own allowed advocates to find a type of advocacy that felt congruent with their strengths. Both practical and direct advocacy were informed by available advocacy training. In the next section, I discuss the next major finding, *Advocacy Training*.

Advocacy Training

Training in counselor education programs about leadership and advocacy is limited, and training in legislative professional advocacy is almost non-existent. The legislative process can be intimidating, and participants argued that training should be aimed at demystifying legislative professional advocacy. In order to demystify, there needs to be a better understanding of the legislative process. This finding empirically confirmed several proposals that understanding of the legislative process is a critical step towards legislative advocacy (Almog-Bar & Schmid, 2014; Barstow & Holt, 2011; Lee & Rogers, 2008). Participants saw the legislative process as an uphill battle that takes time; they did not often see immediate outcomes of their advocacy. By understanding the legislative process, participants persevered and did not get easily discouraged. Similarly, Barstow and Holt (2011) and Lee and Rogers (2008) argued that legislative change happens slowly and advocates should not get discouraged. Comprehending the legislative process can be facilitated by collaboration/mentorship, self-directed training, and hands on training in counselor education programs.

Collaboration with mentors or other community members who knew about the legislative process facilitated participants' advocacy action. These collaborations helped advocates better understand the unspoken rules and culture of the legislative process. In addition, participants

reported feeling more comfortable and confident when they were able to collaborate with others that knew what they were doing. This finding is partially supported by literature on collaboration and networking through advocacy practices (Feldblum, 2003; Lewis, 2011; Ratts et al., 2007) and mentoring through service learning advocacy projects (Bemak & Chung, 2011). However, the role of mentoring in legislative advocacy is a unique finding of this study. In addition, due to lack of formalized training in their counselor education programs, participants learned about the legislative process by doing the work and through trial and error. The main source of legislative professional advocacy training was self-directed. This finding is the first to empirically describe self-learned advocacy in counselor education.

Participants unanimously agreed that training on legislative professional advocacy should be provided in master's and doctoral counselor education programs and should be practical and experiential in nature. Participants also shared that programs could partner with POs to go on "Hill Days" if direct advocacy was the goal of the semester. Semester long advocacy projects are often found in the service learning literature and have been validated as effective techniques to teach advocacy practices (Atici, 2015; Dotson-Blake et al., 2010; Jett & Delgado-Romero, 2009; Stewart-Sicking et al., 2013). In addition, CSI (2017) encouraged counselor education programs to incorporate advocacy training in their curriculum. This study empirically validated the need for hands on training in counselor education in regards to professional advocacy.

The findings of this study provided a better picture of the process of legislative professional advocacy from inception, to delivery, to further training. *Advocacy Action* informed *Advocacy Training* and vice versa, refining and improving the process of legislative professional advocacy. Like all research, this study presented some limitations. In the next section, I discuss limitations found during the research process.

Strengths and Limitations

A strength of this study was use of CGT outlines for methodological integrity. Consistent with CGT, the interview guide must change as the theory emerges (Charmaz, 2014). Later interviews are aimed to prove or disprove the emerging theory; thus, the interview guide presented to earlier participants was slightly different from later participants. In addition, CGT focuses on exploring experiences of a small number of participants. Compared to other qualitative studies in counselor education, the number of participants ($n = 15$) is strong and appears to tend toward representation of the profession in terms of participant gender, region, and race/ethnicity.

Although there is much debate about the generalizability of qualitative research results (Leung, 2015), Charmaz (2014) believed that researcher-participant co-constructions can resonate with others outside of the participant pool. It is not the goal of this research study to generalized participants' experience with legislative professional advocacy. However, the experiences and knowledge participants presented in this study can serve as foundation for training and application considerations and further research.

Limitations of this study included inadequate understanding about the definition of legislative professional advocacy as evidenced by confusion voiced by the first three participants. By having a restricted understanding of legislative professional advocacy, potential participants might have self-screened out of the study due to lack of understanding of how their actions may or may not be related to legislative professional advocacy. In addition, the nature of this study's selection limited to those whose work was known to others through leadership or advocacy action. This created a risk of missing insight from community members and advocates who were in less visible positions yet acted upon legislative professional advocacy. Furthermore,

participants shared that each state and community may have a different way to act upon advocacy. Some actions described in this study may not be appropriate in certain communities based on culture or legislative process.

Data collection relied on participants' retrospective narratives about a socially desirable construct. Perceptions and recall of legislative advocacy action may have been different resulting in overemphasizing or misrepresenting parts of the legislative advocacy process. Because legislative professional advocacy is socially and professionally desirable construct, participants could have presented themselves or the effectiveness of their actions during interviews in a more favorable light. To address these limitations, I used member check of themes and categories (see Appendix G and Appendix I) to capture aggregate experience and reduce misrepresentation of the process or participants' experience.

Despite limitations, additional study strengths included reaching saturation, using thick and rich descriptions to present participants' experience, performing member checking, and using coder triangulation to reduce misrepresentation of the data. These strengths lend confidence regarding rigor of findings and potential use them to further research and practice. In the next section, I will discuss implications for practice and research.

Implications

Study findings provided insight on legislative professional advocacy training, practice, and research. In this section, I propose implications for practice in counselor education and professional organizations and explore implications for research.

Counselor Education Programs

The lack of professional literature and participant observations seems to indicate that training on legislative professional advocacy is largely absent from counselor education

programs. As discussed in the findings, counselor education programs need to provide opportunities for hands on training on legislative professional advocacy. Programs may consider using the Three Tiered Legislative Professional Advocacy model to frame their curricular applications.

Three Tiered Legislative Professional Advocacy could be applied in a standalone course, on leadership and advocacy or infused in core courses such as professional orientation, social/cultural diversity, and practicum and internship as well as in courses specific to practice in specialty areas (e.g., clinical mental health counseling, school counseling). Regardless of location in the curriculum, an *Advocacy Catalyst* needs to be cultivated in educational experiences in order for advocacy action to have meaning. Only after cultivating a catalyst should educators move forward to advocacy action.

Students might pick an advocacy project that needs legislative professional advocacy that connects with their personal or professional identity or community. Educators then facilitate the process by guiding the students through *Advocacy Action* by picking their battles, making it their own, and assessing what barriers to overcome. Educators may also explore *Advocacy Training* by providing hands on *Advocacy Action* experiences and assisting students in evaluating what skills they learned through self-directed learning. The key to legislative professional advocacy training is the personalization of the advocacy action.

A major finding of this study was the role of POs in legislative professional advocacy; POs were foundational to advocacy efforts, reinforcing CACREP (2016) standards. These POs operated on both state and national levels, with state POs often involved more directly in building relationships with representatives and influencing legislation. Counselor education programs should assist students in connecting with state and national POs that match students'

personal and professional interests, passion, values, and identity. By facilitating connections with POs early in academic careers, counselor educators may help develop the Advocacy Catalyst and provide connections necessary for Advocacy Actions. Next, I will discuss implications for POs leaders.

Professional Organizations (POs)

It is not only the responsibility of counselor education programs to connect with POs, but POs should facilitate this relationship. POs need to increase their presence in counselor education programs and offer opportunities for involvement to students. In addition, POs should also connect with their community. As discussed in our findings, POs catalyze advocacy. POs need to be intentional about connecting with their members to provide connection, information, and act as a conduit between legislative issues and their members. POs can help constituents understand the connection of legislative issues to their work so they will feel the pull to get involved. Ultimately, promoting community connection can increase membership and can build collaborations that facilitate identification of and action toward advocacy needs.

POs also need to build connections with state and federal representatives. State POs in particular have increased access to their representatives and understand the cultural nuances within their state to connect and better communicate with their representatives. A working partnership between POs and legislative community representatives can increase the power of POs in terms of voice, credibility, recognition, and prevention of harmful legislation being introduced. Also discussed in findings, lobbyists are essential for legislative professional advocacy. Although not all POs have the ability to hire a lobbyist, POs should make the effort to find funding or connect with community lobbyists to create a working relationship. Volunteer positions for lobbyist also can be offered to fulfill this need.

In addition to implications for counselor education programs and professional organizations, the results of this study open the door for additional research regarding legislative professional advocacy. In the next session, I will discuss implications for further research.

Further Research

A partial theme found in this study was the connection of personal identity with advocacy needs. However, due to the small number of participants and not intentionally recruiting historically marginalized groups, additional research is needed to improve understanding regarding the influence of identity in *Advocacy Catalyst* and *Advocacy Action*. Scholars may explore how advocates from historically marginalized groups relate to advocacy efforts based on their connection with their cultural identities. Participants also recalled that most of their *Advocacy Action* was reactive towards a harmful piece of legislation introduced by their state or federal government. While being reactive, advocates might have been limited in their ability to prepare and strategize their *Advocacy Action*. Additional research is needed to explore whether proactive legislative professional advocacy action differs from reactive legislative professional advocacy action.

This study identified a divide between social justice and professional advocacy. Advocacy could be directed towards equity, equality, and welfare of the community and clients, having a social justice focus. On the other hand, Advocacy could be directed towards what is best for the profession, counselors' ability to practice, and furthering the counseling profession. Participants often felt that they had to choose between social justice and professional advocacy. To balance this divide, participants identified that for them it was about picking their battles and finding where their voice has the most impact. Additional research is needed to gain a better understanding of the decision-making process for those who opt out of social justice advocacy.

This inquiry could be achieved via survey research investigating under which circumstances participants choose social justice or professional advocacy. Researchers could also inquire using qualitative analysis of participants' perceptions of the intersectionality between social justice and professional advocacy.

Research regarding implementation of advocacy is limited (Steele, 2008; Toporek, Lewis, & Crethar, 2009); additional questions regarding advocacy action need to be answered. Authors of conceptual models of advocacy action advised advocates to prepare detailed plans prior to reaching out to legislators (Barstow & Holt, 2011; Dalrymple & Boylan, 2013; Hoff et al., 2009). Participants did not discuss the creation of plans as part of their advocacy efforts and advocacy action. Additional research is needed to expand the *Advocacy Action* tier of the Three Tiered Legislative Professional Advocacy model to provide a deeper understanding of how advocates prepare prior to *Advocacy Action*. In addition, research is needed to assess circumstances under which advocates are successful during the *Advocacy Action stage* and whether participants' perceptions of success impact persistence in *Advocacy Action*.

Lee and Rogers (2008) also discussed that advocates should partner with other professions who have been successful in legislative professional advocacy. As part of *Advocacy Action*, additional research is needed to assess how can the counseling profession benefit from interprofessional collaborations to streamline *Advocacy Action* efforts. In addition, conceptual models of advocacy action discuss a re-targeting phase where advocates re-evaluate their advocacy action (Hoff et al. 2009; Sweeney, 2012). Although *Advocacy Training*, including trial and error, informs *Advocacy Action*, additional research is needed to expand knowledge regarding how advocates re-evaluated efforts and used resources to re-target *Advocacy Action*. Collaboration with others who are knowledgeable about legislative professional advocacy is

included in the three tier model within *Advocacy Action*. Some literature suggests that interprofessional collaboration is especially effective in legislative advocacy efforts (CSI, 2017; Lee & Rogers, 2008). Additional research is needed to assess how can the counseling profession can benefit from interprofessional collaborations to streamline our *Advocacy Action* efforts.

As discussed in the literature review and findings, research on *Advocacy Training* is limited and mostly conceptual. As suggested earlier in this chapter, counselor education programs could implement a formalized training to teach legislative professional advocacy using the Three Tiered Legislative Professional Advocacy model. Researchers may explore impact of implementing the Three Tiered Legislative Professional Advocacy model within the curriculum. This may include manipulation regarding the importance of advocacy catalysts and connection with POs in taking advocacy action and include follow-up opportunities to see if those who engaged in formal curricular experiences sustained membership in POs and engagement in advocacy after graduation. In addition, during the implementation of *Advocacy Catalysts*, researchers could assess whether certain experiences or exercises might help advocates to internalize advocacy responsibility.

In this chapter, I discussed the final findings of this study of the Three Tiered Legislative Professional Advocacy model and connected findings with literature regarding advocacy in general and legislative advocacy specifically. Finally, I discussed study limitations and explored implications for practice and research. Next, I provide a conclusion to this chapter and reflect on what is next for the counseling profession and community.

Conclusion

Legislative professional advocacy is a community effort. It requires POs, counselor education programs, students, professional counselors, legislators, researchers, and community

members to work together for the betterment of the counseling profession and the populations we serve. The counseling profession cannot thrive in isolation. Collaboration and connection are critical to achieving professional goals.

The counseling profession and its leaders need to personalize legislative advocacy efforts. As advocates, we need to be personally and professionally connected. We need to understand how legislative issues impact us and our ability to practice. We need to go beyond sending form emails. We, as advocates, need to build relationships with our communities and state and federal legislative representatives. They need to know us, and we need to know them. Being present in our communities and legislative offices can assist in professional recognition and for legislators to understand we do as counselors and the needs of our clients. As advocates, we also need to go beyond advocacy as a method to feel good about ourselves. We need to assess whether, at the end, anything changed. We need to learn to pick our battles. If we lose credibility and a seat at the table, we lose the ability to advocate for our profession and for the welfare of clients.

We need to know our communities and their culture. We talk about cultural awareness in the counseling field through direct practice. Cultural awareness and how we address legislators also applies. In legislative professional advocacy, we need to practice cultural humility and understand the cultural context at play within each state. We need to use multicultural practices while addressing legislative community representatives. By finding common ground and building allies, we can become effective agents of change.

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Appendices

Appendix A: Invitation to Participants

Dear Counseling Leader

My name is Isabel Farrell, and I am a doctoral candidate in Counselor Education in the Department of Educational Psychology and Counseling in the College of Education, Health, and Human Sciences at the University of Tennessee, Knoxville. I am conducting a study to examine choices and actions among counseling leaders. I am writing to ask for your participation.

Participation entails completing a conference interview via ZOOM for approximately 60-90 minutes. During the interview, I will ask you to share your experiences related to leadership in social/political or legislative advocacy.

Participation in this study is limited to individuals who meet the following inclusion criteria:

1. Hold master's and/or doctoral degrees in professional counseling, and/or maintain professional counseling credentials (e.g., Licensed Professional Counselor, National Certified Counselor, Certified School Counselor)
2. Self-identify as having engaged in leadership related to social/political advocacy or legislative advocacy.

Participation is voluntary, and you have the option to end your participation at any time.

If you would like to participate in the study please go to

https://utk.co1.qualtrics.com/jfe/form/SV_82M84K7gZpun1dz. This will direct you to the informed consent, a screening form, and a short demographics survey. Once completed, I will contact you with further information. If you have questions about this study, please contact me at ihartman@vols.utk.edu. **Please forward this request to any other counseling leaders eligible to participate in this study.**

Thank you in advance for your participation. Your help is greatly appreciated.

Sincerely,

Isabel C. Farrell, MS, LPC (OK), NCC

Appendix B: Informed Consent Statement

Advocacy Choices and Actions among Counseling Leaders: a Grounded Theory

Introduction

You are invited to participate in a study examining social/political or legislative advocacy choices and actions among professional counselors. I am completing this dissertation study as a part of my requirement as a doctoral candidate in the Counselor Education program at the University of Tennessee. The purpose of this constructivist grounded theory study is to explain the process of social/political or legislative advocacy for counseling leaders. Results from this study may improve our understanding of social/political professional advocacy and influence training of future counseling leaders.

Information About Participants' Involvement in The Study

During this study, you will be asked to complete a pre-screening and demographic survey and participate in an audio recorded interview via Zoom conferencing software. The survey will take approximately ten minutes to complete, and the interview will last approximately between one and one and a half hours. During the interview, I will ask you to share your experiences related to social/political professional advocacy. After completion of the interview, you will receive via email a copy of your interview transcript and have an opportunity to make comments, edits, and provide additional information. After a preliminary completion of data analysis, you will be provided with a copy of the preliminary findings and will be asked to respond to an email to ensure your contribution has been accurately represented in the study. The transcription review and preliminary findings feedback are anticipated to take 5-15 minutes each.

Participant Criteria

Participation in this study is limited to individuals who meet the following inclusion criteria:

1. Hold master's and/or doctoral degrees in professional counseling, and/or maintain professional counseling credentials (e.g., Licensed Professional Counselor, National Certified Counselor, Certified School Counselor).
2. Self-identify as having engaged in leadership related to social/political advocacy or legislative advocacy.

Potential Risks

The risks and discomfort associated with participation in this study are no greater than those ordinarily encountered in daily life or during other online activities. The study may pose minimal, psychological risks in the form of discomfort around individual interview questions. If you experience any discomfort in answering any questions, you may choose to decline answering. You can also choose to drop out of the individual interview at any point. There is some risk of breach of confidentiality when collecting and storing identifiable information such as this consent form. These documents will be securely stored; however, some risk still exists when storing identifiable information. As with any research, there is some possibility that you may be subject to additional risks not yet identified. If you have any questions or concerns resulting from your participation in this study, I will provide appropriate referrals for support.

Potential Benefits

There may be no personal benefit from your participation in the study; the knowledge received may be of value in understanding the process of social/political advocacy and improving training for future counseling leaders.

Compensation & Costs

There is no compensation or cost for participation in this study.

Confidentiality

All information obtained about you in this study is strictly confidential unless disclosure is required by federal or state law or you waive your right. Demographic information such as the name of your organization and state of residence will be kept confidential. The results of this study will be used in reports, presentations, and publications, but the researcher will protect your identity in all results. Given the efforts you have taken to engage in leadership related to social/political or legislative advocacy, you may not wish for your identity to be masked. If you wish to waive your right to confidentiality in reporting of study results, you may indicate so below.

Contact Information

If at any time you have questions about the study or procedures, or you experience any problems related to the study, please contact the researchers listed below:

Primary Researcher: Isabel C. Farrell, MS, LPC, NCC, Doctoral Candidate, Department of Educational Psychology & Counseling; College of Education, Health, and Human Sciences; University of Tennessee, Knoxville. Email: ihartman@vols.utk.edu Phone: (918) 688-8166

Faculty Advisor: Casey Barrio Minton, PhD, NCC, Professor, Department of Educational Psychology & Counseling; College of Education, Health, and Human Sciences; University of Tennessee, Knoxville. Email: cbarrio@utk.edu. Phone: (865) 974-8382

If you have questions or concerns about your treatment in this research or your rights as a participant, please contact the University of Tennessee IRB Compliance Officer at 865-974-7697 or utkirb@utk.edu.

Voluntary Participation

Your participation in this study is voluntary; you may decline to participate without penalty. If you decide to participate, you may withdraw from the study at anytime without penalty and without loss of benefits to which you are otherwise entitled. If you withdraw from the study before data collection is completed your data will be deleted and not used for data analysis or reporting purposes.

I have read the above information. I have received a copy of this form. I agree to participate in this study

_____ Participant Name Printed	_____ Participant Signature	____/____/____ Date
Please sign here only if you wish for your name to be used in connection with your comments in reporting these research results		
_____ Participant Name Printed	_____ Participant Signature	____/____/____ Date
_____ Researcher Name Printed	_____ Researcher Signature	____/____/____ Date

Appendix C: Pre-screening Survey

Criteria 1:

1. Do you identify as a professional counselor? (Select all that apply)
 - a. Yes, as evidenced by master's degree in counseling
 - b. Yes, as evidenced by doctoral degree in counseling or counselor education
 - c. Yes, as evidenced by licenses and certifications
 - d. No

Criteria 2:

1. Have you engaged in leadership related to social/political advocacy or legislative advocacy?
 - a. Yes
 - b. No

Appendix D: Demographic Survey

Name:

Age:

Gender:

Ethnicity/Race:

Name of the organization(s) you are a member of:

Leadership Position (if applicable): State of Residence:

Email Contact Information:

Appendix E: Individual Interview Script and Guide

Interviewee Pseudonym:

Organization Affiliation:

Topics Discussed:

Post Interview Comments or Leads:

Introductory Script

Hello, my name is Isabel Farrell, and I will be facilitating our time together today. I want to start by thanking you for taking the time to participate in this study. The purpose of this constructivist grounded theory study is to construct a theory that explains the process of social/political advocacy for counseling leaders. Results from this study may improve our understanding of social/political professional advocacy action and inform training of future counseling leaders.

I anticipate us spending between one to one and half hours together today. I want to remind you that our time together today will be audio recorded and transcribed verbatim as a part of this research study. Are there any questions or concerns about that or any other parts of the informed consent you received? Please know that you are free to decline to answer specific questions or to withdraw from this interview or the study at any time. In addition, if you have any questions as we proceed please feel free to ask those questions. I am going to begin our recording now.

A. Interviewee Background

1. First, I would like to get to know you a bit better. Tell me a little bit about you.
 - a. Tell me more about your professional experiences.
2. What attracted you to this study?
3. Tell me about your role as a counseling leader.
 - a. (Theoretical inquiry): What is your definition of Leadership?
 - b. How have you been engaged with professional organization?
 - i. Have you been involved in a leadership role? (if hasn't been answered)
 1. If so, tell me more about your experience in this role
 2. What led to in pursuing this role?
4. As a leader, how do you see social/political professional advocacy?
 - a. (Theoretical inquiry): What is your definition of social/political professional advocacy?

B. Social/Political Advocacy Action

Tell me more about your involvement with social/political professional advocacy?

1. How did you identify issues that needed social/political professional advocacy?
2. If you decided to act upon an issue...
 - a. How did you get involved? Specific actions?
 - b. What motivated you?
 - c. What was your experience?
 - d. What was the result?

3. If you decided to not act upon an issue
 - a. What stopped you?
 - i. Any barriers?
4. (Theoretical inquiry): how do you see the role of the individual counselor and a professional organization's role within legislative advocacy?
5. What are some of the major challenges you faced or are facing with social/political professional advocacy?
 - a. What changes do you see in our profession regarding social/political professional advocacy?

C. Training and development

1. Tell me more about your training in leadership and advocacy
 - a. Tell me more about your training regarding social/political professional advocacy specifically
2. How did engaging in social/political professional advocacy affect your development as a leader?
3. How can training social/political professional advocacy be improved?

D. Resources

1. What resources did you have to navigate social/political professional advocacy?
2. What advice do you have for leaders who wish to act upon social/political professional advocacy?

E. Wrapping up

1. Is there anything we haven't talked about regarding your experience with social/political professional advocacy that you would like to tell me about?

Appendix F: Invitation to Schedule Interview

Dear (Participant name),

Thank you for completing the screening survey for the study titled *Advocacy Choices and Actions among Counseling Leaders: A Grounded Theory*. I appreciate your willingness to participate in this study. Attached is the consent form, please read it over, and let me know if you have any questions or concerns. If you have no further questions, please sign it and sent it back to me for my records.

Participation entails completing a conference interview via ZOOM for approximately 60-90 minutes. During the interview, I will ask you to share your experiences related to leadership in social/political or legislative advocacy. After completion of the interview, you will receive via email a copy of your interview transcript and have an opportunity to make comments, edits, and provide additional information. After a preliminary completion of data analysis, you will be provided with a copy of the preliminary findings and will be asked to respond to an email to ensure your contribution has been accurately represented in the study. The transcription review and preliminary findings feedback are anticipated to take 5-15 minutes each.

Participation is voluntary, and you have the option to end your participation at any time. I will send you a link to our web-meeting one we have one scheduled. I will request for you to assign your own pseudonym at the beginning of the interview to protect your confidentiality, unless you wish to waive your right to confidentiality in reporting of study results selected in the consent form.

If you wish to participate, please reply to this email with 3 possible dates and times that works best for you.

Thank you,
Isabel C. Farrell, MS, LPC (OK), NCC

Appendix G: Invitation to Member Check

Member Check: Transcript

Dear (Participant name),

Thank you for completing the interview for the study titled *Advocacy Choices and Actions among Counseling Leaders: A Grounded Theory*. I appreciate your continued willingness to participate in this study. Attached is completed the transcript of your interview. Please read it over and let me know if you have any questions, concerns, or if there is anything would like to change, add, or delete to the transcript. I want to assure that your voice as a participant has been captured in this transcript.

Thank you again for participating
Isabel C. Farrell, MS, LPC (OK), NCC

Member Check: Preliminary Findings.

Dear (Participant name),

Thank you for completing the interview and transcript review for the study titled *Advocacy Choices and Actions among Counseling Leaders: A Grounded Theory*. I appreciate your continued willingness to participate in this study. Attached are the preliminary findings for this study. The preliminary findings encompass the major themes and categories found across interviews. Please read it over and let me know if you have any questions, concerns, or if there is anything would like to add. I want to assure that your voice as a participant has been captured in the preliminary findings.

Thank you again for participating
Isabel C. Farrell, MS, LPC (OK), NCC

Appendix H: IRB Outcome Letter



November 27, 2017

Isabel Cecilia Farrell,
UTK - Coll of Education, Hlth, & Human - Educational Psychology & Counseling

Re: UTK IRB-17-04098-XP
Study Title: Advocacy Choices and Actions among Counseling Leaders: A Grounded Theory

Dear Isabel Cecilia Farrell:

The UTK Institutional Review Board (IRB) reviewed your application for the above referenced project. It determined that your application is eligible for expedited review under 45 CFR 46.110(b)(1), categories (6) and (7). The IRB has reviewed these materials and determined that they do comply with proper consideration for the rights and welfare of human subjects and the regulatory requirements for the protection of human subjects.

Therefore, this letter constitutes full approval by the IRB of your application (version 1.0) as submitted, including:

Appendix B Consent Form v 1.0

Appendix A Invitation to Participants v 1.0

Appendix D Demographic Survey v 1.0

Appendix G Invitation to Member Check v 1.0

Appendix F invitation to Schedule Interview v 1.0

Appendix E Individual Interview Script and Guide IRB v1.0

Appendix C Pre-screening survey v 1.0

The above listed documents have been dated and stamped IRB approved. Approval of this study will be valid from November 27, 2017 to November 26, 2018.

In the event that subjects are to be recruited using solicitation materials, such as brochures, posters, web-based advertisements, etc., these materials must receive prior approval of the IRB. Any revisions in the approved application must also be submitted to and approved by the IRB prior to implementation. In addition, you are responsible for reporting any unanticipated serious adverse events or other problems involving risks to subjects or others in the manner required by the local IRB policy.

Finally, re-approval of your project is required by the IRB in accord with the conditions specified above. You may not continue the research study beyond the time or other limits specified unless you obtain prior written approval of the IRB.

Sincerely,

Colleen P. Gilrane, Ph.D.
Chair

Institutional Review Board | Office of Research & Engagement
1534 White Avenue Knoxville, TN 37996-1529
865-974-7697 865-974-7400 fax irb.utk.edu

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Appendix I: Member Check of Themes and Categories

Defining Social/Political Professional Advocacy:

Due to lack of empirical support regarding how social/political professional advocacy is defined, the following definition is an aggregate of the participants' own definition of social/political professional advocacy.

Advocacy related to legislation to improve or change policies that impact the counseling profession, clients, and the counselor's ability to practice.

Within its definition, participants shared that there is an urgent need for social/political professional advocacy in our profession to increase national recognition, continue to grow as a profession, and protect our ability to practice.

Connection to Personal and Professional Identity

1. Experience and Knowledge about an issue and passion for advocacy fuels and informs advocacy action. Advocates act upon issues that are tied to their expertise, values, and interest. This is tied with participants' views of their own professional identity and subscription to professional values. When issues did not match experience or knowledge, participants often decided not to act.
2. Personal Values and Personal Characteristics (e.g., introversion, extroversion, and leadership skills) also fuel and inform advocacy action. Personal values can come from culture, family, community, or personal identity. Personal values were also attributed to processing of privileged identities. Participants used their privilege to support advocacy efforts. When issues did not match their values, participants often decided not to act.

Use of Personal and Professional Community

1. Advocacy action is informed and influenced by community needs and professional organizations' members needs and goals. At times, the decision to advocate for something was guided by voices of members of professional organizations.
2. **Community influence:** Size and culture of participants' community influenced their advocacy action. Smaller communities assisted participants in getting to know their representatives and build fruitful relationships. These relationships facilitated advocacy action. Community culture was also an influence. For some participants, their community's culture was highly political, making social/political professional advocacy more accessible. Other participants disclosed that their community politics deterred them from acting upon issues due to a sense of hopelessness: "nothing is going to change."
3. **Professional organization (POs):** Professional organizations served multiple roles in Social/Political Professional advocacy.
 - a. POs as a source of connection: POs allowed participants to connect with others with similar passions and interest, which provided an incentive for action and facilitated collaboration.
 - b. **POs as a source of information:** POs were often the source of legislative information and action. POs provided both information about legislative issues and guidelines for how to act upon the issues. This facilitated advocacy action.

- c. **POs as a conduit:** POs served as a conduit between legislative issues and the counseling community. POs were responsible for identifying and communicating legislative issues to their members.
- d. **Lobbyist as a resource for POs:** The legislative process can be arduous, complicated, and time consuming. Within their roles as professional organization leaders, lobbyists facilitated monitoring of legislation and social/political professional advocacy action. In addition, participants argued that social/political professional advocacy can be almost impossible without a lobbyist.
- 4. **Collaboration:** Social/political professional advocacy action is eased by collaboration and partnerships with others who have experience with Social/political professional advocacy. In addition, collaborations with others who had similar passions or knowledge about issues provided incentives for advocacy action. Many participants believed divisiveness in the profession compromised advancement of the profession and unity toward common issues. Participants argued that counseling leaders need to collaborate toward a common goal. Lastly, there are “strength in numbers;” collaboration increases visibility, momentum, and impact.
- 5. **Knowing community representatives:** Knowing community representatives was imperative for advocacy action. Advocates should know who their representative are (at local, state, and national level), and build relationships with local representatives prior to legislative issues. These relationships assist in gaining support of representatives when legislative issues arise, increase visibility of the counseling profession, and foster potential partnerships between counselors and legislators.

Making it your Own:

Social/Political Professional advocacy does not have to look the same for everyone. Participants used different tools in order to act upon legislative issues. Participants described two main types of advocacy: Practical and Direct

- 1. **Practical Advocacy:** Entails all types of advocacy that is non-direct that does not involve in person contact with stakeholders. For example, emails, postcards, phone calls, and social media. Participants reported that although all types of advocacy can make an impact, phone calls and social media where the types of practical advocacy that, in their experience and knowledge, had better results.
- 2. **Direct Advocacy:** Direct advocacy involves in-person advocacy action. Direct advocacy can be having a meeting with a representative or staff member or working with lobbyist/representatives at the capitol. Participants often reported two main events that helped with direct advocacy action: “Days on the Hill,” at state and federal levels, often organized by POs and the ACA’s Institute for Leadership Training.

Picking your Battles:

Although rightful causes are worth advocating for, advocates learned to pick their battles.

- 1. **Choosing when to use the power of your voice:** Leaders cannot advocate for all legislative issues that arise because it reduces the impact of the advocates’ voice and its effectiveness. Advocates need to pick battles that are for the benefit of the profession, organization, its members, or their community.

2. **Beware of political ploys:** Some legislative issues could be “fillers” as a method to make a political statement, with no real intention of making it past its sponsor. Prior to advocating, advocates should research the bill, its sponsor, and who else is supporting the bill.
3. **Social justice and professional advocacy:** Participants noticed the common division between social justice (what is best for the client) and professional advocacy (what is best for the profession). Participants also noticed that advocates are often more willing to advocate towards social justice than professional issues. At times, social justice issues and professional advocacy issues are at odds with each other. In the long run, advocating for some social justice issues could cause more harm than good for the profession. Advocates should take into consideration the long-term impact of their advocacy action.

Demystifying Social/political Professional Advocacy:

The legislative process can be intimidating. Their first time advocating for/against policy was overwhelming and nerve wracking. However, participants quickly learned in that action is simple once one has foundational knowledge about the legislative process. Understanding the legislative process can be facilitated by collaboration/mentorship, self-directed training, and hands on training in counselor education programs.

1. **Collaboration/Mentorship:** the legislative process is complex and not common knowledge in the counseling profession. By partnering with a lobbyist or other community mentors with legislative knowledge, participants were able to understand and learn nuances of the legislative process. This helped them understand the importance of celebrating “small wins” because legislative advocacy can be a long and arduous process.
2. **Self-directed Training:** Due to the lack of formalized training in counselor education programs, participants learned about social/political professional advocacy action by doing the work and through trial and error. Most of the training received in leadership and advocacy and social/political professional advocacy was primarily outside of counselor education programs.
3. **Hands on Training in Counselor Education:** To demystify social/political professional advocacy, hands on training in masters and doctoral programs is required. Programs should either have a stand-alone class in leadership and advocacy where social/political professional advocacy is addressed or infuse social/political professional advocacy in several courses. Training in social/political professional advocacy must be “hands on.” Participants suggested that programs teach students how to do the whole process, from identifying an issue that needs advocacy, to applying different ways of advocacy (practical and direct). Participants also shared that programs can partner with POs to go on “Hill Days.”

Roadblocks to Social/political Professional Advocacy: Leadership and Advocacy is often done as a volunteer position. Their most common barrier to advocacy action was lack of time; job demands often limited how much time they could spend advocating. Another barrier included finances. Not all participants lived near the capital where they could meet with their representatives, therefore limiting their advocacy type. Lastly, job affiliations also limited their willingness to advocate for certain causes. Fear of losing their jobs or being portrayed a certain way caused participants to not act upon certain issues.

Vita

Isabel Cecilia Farrell was born in Valencia, Carabobo, Venezuela on February 18th, 1987. She earned a Bachelor of Arts degree in Psychology from Northeastern State University and a Master of Science Degree in Counseling Psychology from Northeastern State University. Isabel's primary professional experience includes providing individual, group, and family counseling services to low income Spanish speaking children and their families. In addition, she served as a counselor and education coordinator at a domestic violence and sexual assault intervention agency. She has experience with teaching and supervising at both the masters and undergraduate level. Isabel has co-authored multiple journal articles currently under review and presented at local, state, regional, national, and international conferences. Isabel will graduate with a Ph.D. in Counselor Education in May 2018.