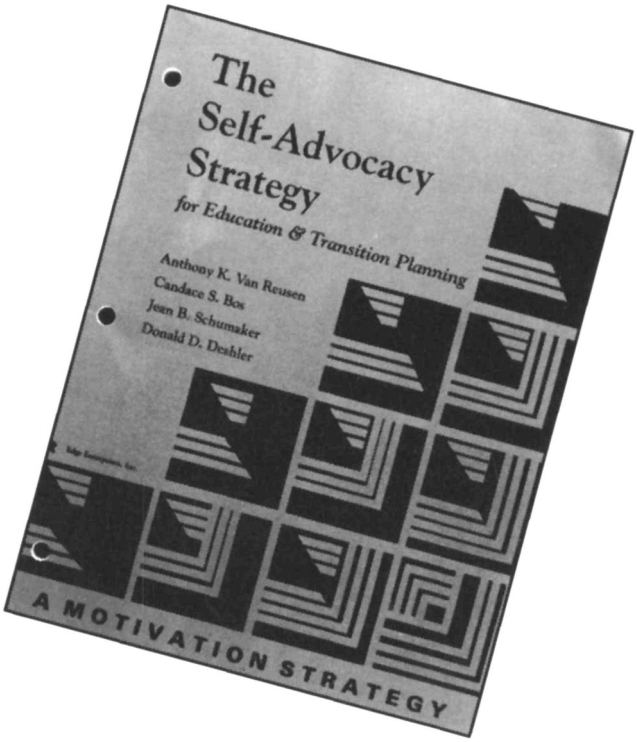
NEW PRODUCTS

The Self-Advocacy Strategy for Education and Transition Planning

Anthony K. Van Reusen

New Products is a regular department that describes recently published teaching materials or tests. It is usually written by the staff of the publisher or by the author of the material or test. Suggestions for this column should be sent to Ann Grasso Ryan, Column Editor, University of St. Thomas, 2115 Summit Ave., St. Paul, MN 55105.—**AGR**



Most educational professionals who deal with day-to-day aspects of providing special and remedial education are committed to developing the highest educational life potential they possibly can for the students they serve. An example of this type of commitment is found in the new *Self-Advocacy Strategy for Education and Transition Planning* (Van Reusen, Bos, Schumaker, & Deshler, 1994). This new manual is an updated version of the manual for the Education Planning Strategy (Van Reusen, Bos, Schumaker, & Deshler, 1987). The Self-Advocacy Strategy was created to more effectively address the complex educational and/or transition concerns of students and others exhibiting learning and performance problems, and the revision reflects recent developments in strategic instruction, motivation, and self-advocacy research. Many of the changes incorporated into this new manual also stem from invaluable feedback and suggestions provided by teachers, students, parents, and other professionals who used the original strategy.

Self-Advocacy Definition and Strategy Purpose

Self-advocacy, as defined by Van Reusen et al. (1994), refers to an

Downloaded from isc.sagepub.com at PENNSYLVANIA STATE UNIV on September 29, 2015

individual's ability to effectively communicate, convey, negotiate, or assert his or her interests, desires, needs, and rights. It assumes the ability to make informed decisions. It also means taking responsibility for those decisions. Similarly, the idea of teaching students how to make effective learning and development decisions and use self-advocacy skills is based on research showing that students who have positive self-perceptions and perceived control over their learning abilities are more willing and motivated to work successfully with the adults in their environment (Brown, 1988; Perlmutter & Monty, 1977; Schunk, 1989; Schunk & Rice, 1985).

The purpose of the Self-Advocacy Strategy is fivefold. First, as a motivation strategy, it is designed to enable students to systematically gain a sense of control and influence over their own learning and development. Second, the strategy focuses students' attention on their learning and transition skill strengths and provides them with a systematic process for identifying or determining specific skills they want to learn or improve. Third, mastery of the strategy enables students to take an active role in making decisions related to their learning and development experiences. Fourth, the strategy provides students with a way of getting organized before any type of conference or meeting. Finally, the steps of the strategy remind students about behaviors and techniques needed for effectively communicating and advocating their education and/or transition goals.

Instructional Focus

Instruction in the Self-Advocacy Strategy is directed toward increasing students' self-knowledge and their understanding that regardless of the learning situation, ultimately they control or determine what, how, how well, and why they learn. Thus, instruction is designed to increase students' investment in their own learning, intrinsic motivation, and commitment to learn. Additionally, although the Self-Advocacy Strategy is a motivation strategy that students can use when preparing for and participating in any type of meeting or conference, instruction emphasizes the importance of students becoming active and responsible participants in determining their lives by advocating for and negotiating their own futures.

Through Self-Advocacy Strategy instruction, students and others learn how to take inventory of their educational and/or transition strengths, areas to improve or learn, and choices for learning or needed accommodations. Further, they learn how to set goals for learning and preparing themselves for the transition from school to adult life. With regard to transition, students learn how to identify their current interests and needs with respect to independent living skills, career and employment skills, financial and consumer skills, social and family living skills, citizenship and legal skills, health and wellness skills, community resource skills, and leisure and recreations skills. In addition, they learn how to communicate this information in a productive manner during conferences or other meeting situations and take an active role in making decisions. In sum, the instruction provides students, parents, and others a framework or strategic system for making plans and carrying out those plans in order to achieve successful educational experiences and transitions from educational settings to the workforce, adult life, and community settings.

Changes from Previous Version

It should be stressed to teachers, educational therapists, counselors, parents, and others familiar with the original Education Planning Strategy that this new manual contains the same I PLAN steps and SHARE behaviors used in the original strategy. The acronym I PLAN is used to help students remember the five steps involved in the strategy. Each letter in I PLAN serves to cue students to use each step of the strategy:

Inventory, the first step, gives students an opportunity to identify and list their perceived education and/or transition strengths, areas for improvement or learning, goals, needed accommodations, and choices for learning.

Provide Your Inventory Information, the second step, focuses on how to provide input during a conference or meeting.

Listen and Respond relates to effectively listening to others' statements or questions and responding to them.

Ask Questions involves asking appropriate questions to gather necessary information.

Name Your Goals involves communicating personal goals, ideas, and responsibilities on action to be taken.

Hence, the Self-Advocacy Strategy is often called the I PLAN strategy, and the steps are often referred to as the I PLAN Steps. In mastering the strategy, students also learn how and when to use the SHARE behaviors, which are basic techniques for effective communication. These behaviors include

S Sit up straight.
H Have a pleasant tone of voice.
A Activate your thinking.
R Relax.
E Engage in eye communication.

The major difference between this new manual and the Education Planning Strategy manual is that The Self-Advocacy Strategy manual contains instructional procedures, materials, and activities for two types of conferences: education planning and transition planning. (Information in the original manual was limited to education planning conferences only.) In some states and school districts, these planning conferences are conducted separately. In others, education and transition planning take place during the same conference.

Information in this new manual helps educators and others decide which type of conference to conduct, on the basis of whether students need to focus primarily on education planning, transition planning, or both. For elementary-age students, education planning conferences may be the best choice. For adolescents and adults, including those who have already left school, transition planning conferences are most appropriate. For middle, junior high, or high school students, both

Downloaded from isc.sagepub.com at PENNSYLVANIA STATE UNIV on September 19, 2016

education and transition planning conferences may be appropriate. In any case, all students determined eligible for special education services are required by law to have an Individualized Education Program (IEP) that is developed in a planning conference before they are placed into a special education program and before they receive any special education services. In addition, the IEPs of students who are receiving special education services must include transition goals by the time the students are 16 years old (and when appropriate, by age 14 or younger).

Due to the major differences between the two types of conferences, three relevant inventory sheets and other associated materials are included in the new manual, including a revamped Education Inventory and revised education skill lists; a modified Education Inventory, called "My Personal Inventory," for younger students (Grades 2 through 5); and a new Transition Inventory and transition skill lists for students in middle, secondary, and post-secondary settings.

Instructional Sequence

The Self-Advocacy Strategy manual also reflects current knowledge and technology about strategy instruction that effectively enhances students' strategy acquisition and generalization. Consequently, the new manual is organized around a modified Instructional Stage Model (Ellis, Deshler, Lenz, Schumaker, & Clark, 1991), with each stage incorporating such effective instructional practices as advance organizers, lesson organizers, and postlesson organizers to promote student learning, goal attainment, and use of the strategy. Students with learning and behavior problems who participated in the field-test studies mastered the Self-Advocacy Strategy when the instructional stages presented in Figure 1 were implemented. The description below summarizes these instructional stages and the sequence to follow.

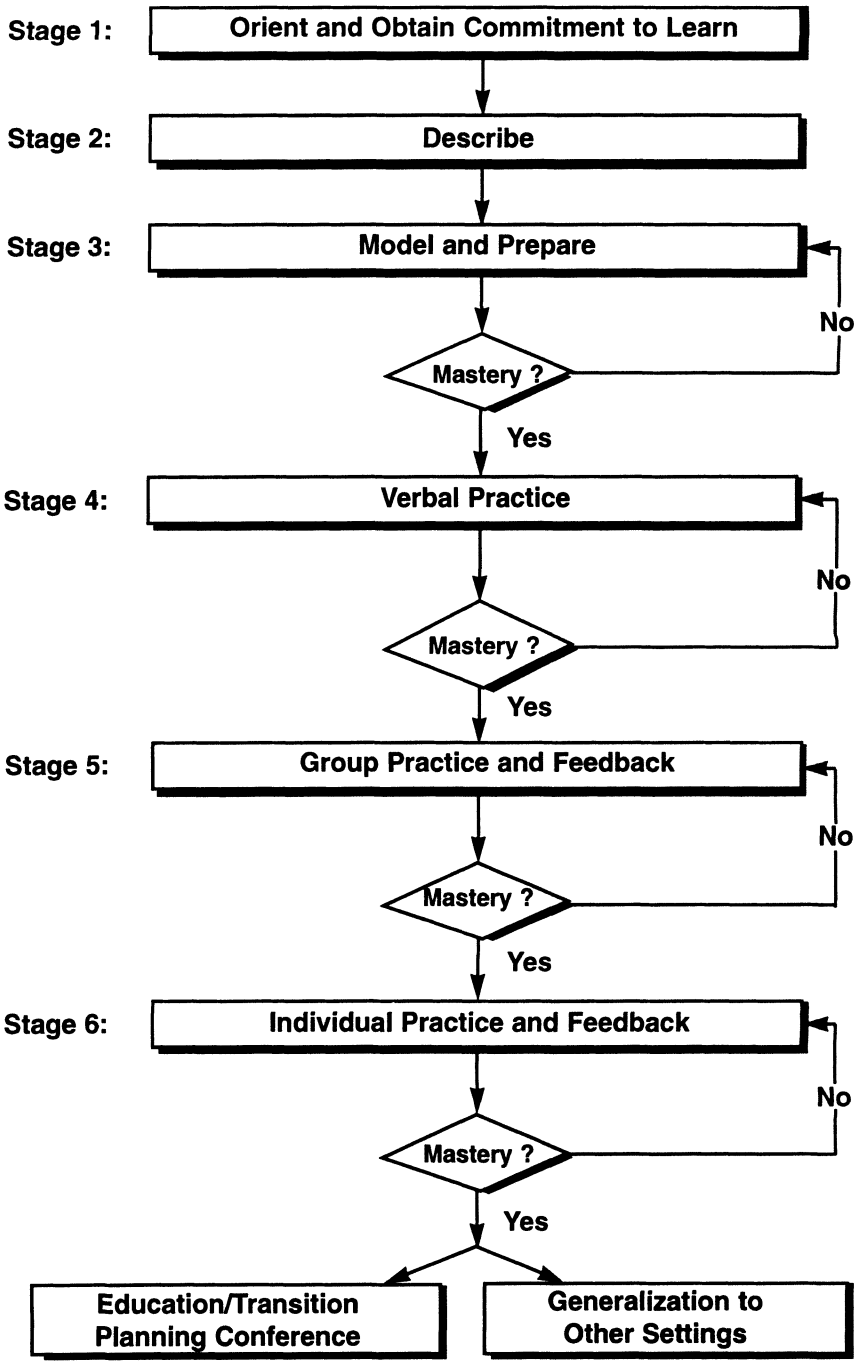


Figure 1. The Self-Advocacy Strategy instructional sequence.

Stage 1: Orient and Make Commitments

In this first stage, students are introduced to the concept of education and transition conferences, the purpose of the Self-Advocacy Strategy, and how learning this strategy gives them more power and control over their own learning and development experiences in and out of school. Students are also asked to make a commitment to learn the strategy, and the instructor makes a commitment to teach the strategy to them. Experience in working with older students has indicated that student effort and motivation throughout the instructional process is greater if students make a verbal or written commitment to learn the strategy and if their instructor makes a similar commitment to teach it.

Stage 2: Describe

The describe stage is designed to paint a picture that details the

Downloaded from isc.sagepub.com at PENNSYLVANIA STATE UNIV on September 19, 2016

nature of the skills to be taught and the advantages of using those skills. First, education and/or transition conferences are defined. Next, the type of conferences or meetings in which students are likely to participate and the general characteristics of those conferences or meetings are described. Third, students are shown how they can personally benefit by attending conferences and meetings and applying the Self-Advocacy Strategy. An interactive format is used, and students are given example situations where using the strategy has made a difference for other students. Experience suggests that such discussion about the kinds of advantages and results students can expect after learning the strategy is important for enhancing student interest and involvement.

Stage 3: Model and Prepare

Students learn a skill better if they can see it and hear it performed rather than just hearing a description of what to do; that is, they can learn skills by imitating good models. In this stage, the I PLAN steps of the strategy are demonstrated while the instructor thinks aloud so the students can hear the necessary cognitive processes as well as the overt behaviors involved in performing the strategy. The first step of I PLAN, the Inventory step, requires the longest time to model. Here students complete their Education or Transition Inventory. Due to the length of this step, the instruction is designed so that each part of the Inventory step is modeled and then students immediately complete that part. When the demonstration for the Inventory step of the strategy is concluded, students will have completed the inventory they will use at their upcoming education and/or transition conference. Also during the Model and Prepare Stage, the remaining steps of the strategy, which focus on when and how to communicate during a conference or meeting, are demonstrated. Thus, each of the I PLAN Steps, the cognitive processes, and the overt behaviors involved in performing these steps is presented clearly and explicitly.

Of all the teaching stages, the Model and Prepare Stage takes the most time to complete. This is because the students complete the Inventory step as part of this stage. Because of the differences between education and transition planning conferences, two Model and Prepare Stages are presented in the manual. If two conferences (i.e., education and transition planning) are combined into the same conference, parts of the Education Inventory and the Transition Inventory can be selected to reflect the unique needs of a student. For example, the career and employment planning section of the Education Inventory might be omitted because the Transition Inventory contains a section in this area. Parts of the Transition Inventory might be selected as more appropriate for some students than for others. For example, one student's Transition Inventory may reflect his need to focus on independent living skills whereas another student's Transition Inventory may reflect her need to focus primarily on future education needs.

Stage 4: Verbal Practice

Before students are asked to use the strategy, they should be able to name the strategy steps and describe in detail where, when, how, and why they should use the strategy at an automatic level. Therefore, during this instructional stage, students are first asked questions to ensure that they know what to do during each step of the strategy, and where, when, and why they need to use it. Next, they are asked to verbally rehearse the I PLAN steps and the SHARE behaviors. This practice facilitates future independent use of the strategy. The verbal practice activities detailed in the manual can be effectively and quickly carried out with a group of students through "rapid-fire" exercises in which the instructor points to each student in succession and each student names or explains a strategy step or answers a question about the strategy. Once students appear to know the strategy steps and their purpose, they can practice individually or in small groups. Students practice until they can name and explain the steps individually without help. Their knowledge is assessed individually using a checklist provided in the manual.

Stage 5: Group Practice and Feedback

When students demonstrate both understanding and verbal mastery of the steps and concepts of the strategy, they participate as a group in a simulated conference. First, the instructor reviews what takes place during a particular type of conference or meeting, lists who will participate, and describes the students' responsibilities. Second, the instructor conducts a simulated conference or meeting by directing questions and statements to individual students and requiring them to respond. After each response, the instructor and the other students provide feedback on how effectively each student used the strategy (e.g., whether the student looked at the conference participants while talking, used a pleasant tone of voice, responded in complete statements, and referred to the Education or Transition Inventory). A group practice score sheet is used in this stage to score each student's performance. Simulated practice activities continue until the students consistently use the strategy effectively.

The role of individual feedback during this stage is perhaps the most important element of the instructional process. Research has shown that students make the greatest gains when they receive specific and well-timed feedback (Gersten, Carnine, & Woodward, 1987; Kline, Schumaker, & Deshler, 1991; Kulhavy, 1977; Perkins, 1988). Without such feedback, students with learning problems often continue to practice incorrect responses, thus delaying mastery of the targeted strategy. Tape-recording or videotaping the simulated conference activities and asking students to listen to (or watch) some of the responses and comments on them can be a very helpful part of this stage. The audio or video recording of the simulated conference is also useful in the instructional activities in Stage 6.

Stage 6: Individual Practice and Feedback

In this stage of the instructional sequence, the instructor meets with each student individually to allow for practice, feedback, and mastery. During this stage, students' participation in the simulated conference

Downloaded from isc.sagepub.com at PENNSYLVANIA STATE UNIV on September 19, 2016

(conducted in Stage 5) is first reviewed; that is, each student self-evaluates, and the instructor provides feedback regarding the student's use of the I PLAN steps and the SHARE behaviors. Then, the strategy steps and behaviors are reviewed with the student. Next, another simulated conference or meeting is conducted with the student in a one-to-one format. Feedback and additional practice are provided as needed. Again, audio- or videotaping the individual simulated conference facilitates the provision of individual feedback. This type of individual practice and feedback continues until the student reaches mastery, which typically requires 10 to 15 minutes. Immediately following the individual practice and feedback, the student has an opportunity to ask questions about a specific upcoming conference or meeting.

This stage is also designed to promote acquisition durability; specifically, it is used to fade the prompts and cues given in the earlier stages. In this manner, the student becomes responsible for taking the initiative and getting more actively involved in using the strategy. The role of individual feedback during this stage of the instructional sequence is as critical as during earlier stages; however, rather than the instructor assuming major responsibility for the feedback process, the student becomes responsible for self-evaluation and reflection. This is accomplished by asking the student questions about his or her use of the strategy steps and associated behaviors, thus enabling the student to analyze his or her effectiveness.

Stage 7: Generalization

Mastering a motivation strategy like the Self-Advocacy Strategy serves little purpose unless it is used at the intended times and in the intended settings. Therefore, the real measure of effective instruction is the degree to which students can generalize the strategy to the real world and maintain its use over time. In this stage, students are assisted in using the strategy during actual conferences or meetings and in adapting it for a variety of meetings or conferences (i.e., job interviews, performance evaluations, negotiations with parents, club and team meetings, etc.). Three distinct phases are addressed in this stage of instruction. First, a Preparing for and Conducting a Planning Conference Phase provides each student with an opportunity to directly use the acquired skills in an education or transition conference. Second, a Preparing for Other Uses of the Strategy Phase makes students aware of other formal and informal situations where they can use the strategy as well as ways in which they may need to adjust the strategy to meet unique situations. Finally, a Preparing for Subsequent Conference Phase helps students review the purpose of particular conferences or meetings, as well as the importance of their participation. Here, students are given an opportunity to review the steps and associated behaviors of the strategy and update their Education or Transition Inventory. In this generalization phase, students have the opportunity to practice their use of the strategy, especially before an actual meeting or conference.

Included Concepts and Skills

In brief, the major concepts and skills acquired by students who learn the Self-Advocacy Strategy include the following:

- Nonverbal and verbal behaviors necessary for good communication
- Benefits of self-talk
- Active versus passive listening
- Self-knowledge and self-awareness skills
- Social and pragmatic skills
- Informed decision making
- Planning
- Self-Advocacy
- Conversation skills
- Information gathering
- Acceptance of criticism and feedback
- Questioning
- Negotiation and problem solving
- Acceptance of responsibility

Strategy Uses: When and Where?

Once students have learned the strategy sufficiently, they can use it prior to or during any type of conference or meeting, such as

- An informal conference conducted by instructors, parents, and other professionals with students who may be exhibiting learning problems;
- An IEP conference that is held at least annually for students receiving special education services;
- An Individualized Transition Program (ITP) conference held for the purpose of planning and specifying needed transition services for students with disabilities, no later than age 16, and when appropriate, beginning by the age of 14 or younger;
- An Individualized Vocational Education Program (IVEP) conference held at least annually for special education students receiving vocational education;
- A career planning conference conducted by a school counselor;
- A vocational planning conference conducted by a vocational evaluator, counselor, or career counselor;
- A Vocational Rehabilitation Program (VRP) conference conducted with a rehabilitation or vocational evaluator or counselor;
- Disposition meetings or conferences for adjudicated youth by court-appointed social workers, probation officers, and youth evaluators;
- A meeting with a parent or guardian to resolve problems or negotiate permission; and
- A job interview or a performance evaluation.

Conclusion

In summary, the Self-Advocacy Strategy for Education and Transition Planning should be viewed as an effective tool that can be used to involve students, both young and old, in planning their education and/or transition programs with the ultimate goal of increasing their motivation and commitment to learning. This strategy focuses on helping students identify and verify their beliefs about their education and transition strengths, make informed learning and development decisions, and advocate for themselves. It is used to teach students to identify and prioritize needs,

Downloaded from isc.sagepub.com at PENNSYLVANIA STATE UNIV on September 19, 2016

choose goals, and increase their interest in and efforts toward learning and goal attainment. By providing students with opportunities to learn and use decision-making and self-advocacy skills, teachers and others can better prepare them to become full participants in our democratic society.

Anthony K. Van Reusen, PhD, is an associate professor of educational psychology in the Division of Education, College of Social and Behavioral Sciences, University of Texas at San Antonio. Address: Anthony K. Van Reusen, Division of Education, College of Social and Behavioral Sciences, University of Texas at San Antonio, 6900 North Loop 1604 West, San Antonio, TX 78249.

Author's Note

The Self-Advocacy Strategy for Education and Transition Planning may be ordered by calling Edge Enterprises, Inc., at 913/749-1473 after 3 p.m. CMT, or by writing to Edge Enterprises, Inc., P.O. Box 1304, Lawrence, KS 66044.

References

Brown, A. (1988). Motivation to learn and understand: On taking charge of one's own learning. *Cognition and Instruction, 5,* 311–321.

Ellis, E. S., Deshler, D. D., Lenz, K. B., Schumaker, J. B., & Clark, F. L. (1991). An instructional model for teaching learning strategies. *Focus on Exceptional Children, 23*(6), 1–23.

Gersten, R., Carnine, D., & Woodward, J. (1987). Direct instruction research: The third decade. *Remedial and Special Education, 8*(6), 48–56.

Kline, F. M., Schumaker, J. B., & Deshler, D. D. (1991). Development and validation of feedback routines for instructing students with learning disabilities. *Learning Disability Quarterly, 14,* 191–207.

Kulhavy, R. W. (1977). Feedback in written instruction. *Review of Educational Research 47,* 211–232.

Perkins, V. L. (1988). Feedback effects on oral reading errors of children with learning disabilities. *Journal of Learning Disabilities, 21,* 244–248.

Perlmutter, L. C., & Monty, R. A. (1977). The importance of perceived control: Fact or fantasy. *American Scientist, 65,* 759–765.

Schunk, D. (1989). Self-efficacy and cognitive skill learning. In C. Ames & R. Ames (Eds.), *Research on motivation in education. Vol. 3: Goals and cognitions* (pp. 13–44). San Diego: Academic Press.

Schunk, D., & Rice, J. (1985). Verbalization of comprehension strategies: Effects on children's achievement outcomes. *Human Learning, 4,* 1–10.

Van Reusen, A. K., Bos, C. S., Schumaker, J. B., & Deshler, D. D. (1987). *The education planning strategy.* Lawrence, KS: Edge Enterprises.

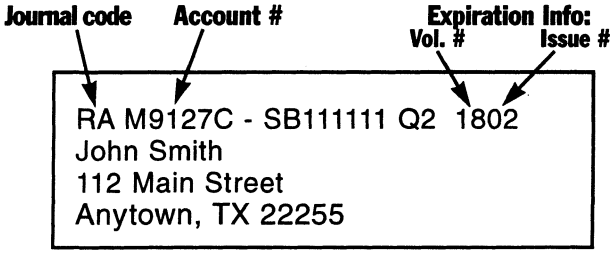
Van Reusen, A. K., Bos, C. S., Schumaker, J. B., & Deshler, D. D. (1994). *The self-advocacy strategy for education and transition planning.* Lawrence, KS: Edge Enterprises.

NEED INFORMATION ABOUT YOUR ACCOUNT?
HELP US HELP YOU!

Maybe you aren't sure when your subscription expires.
Or you have questions regarding billing.
Or you need to put your account number on a renewal order form, but aren't sure what that number is.

Knowing your label can help with all these questions

1. Your journal code is the 2 or 3 letters on the top left line.
2. Your account number is the string of numbers after the letter M on the top left line. *Putting this number on any order forms or correspondence with us regarding your subscription will help expedite matters efficiently.*
3. Your subscription expiration is identified by 2-digit volume and issue numbers on the top right line of your label.



For example, in the above label, the journal code is RA for *Remedial and Special Education,* the account number is M9127C, and the subscription will expire with Vol. 18, No. 2.

Downloaded from isc.sagepub.com at PENNSYLVANIA STATE UNIV on September 19, 2016