

Instructional Stages: Part Four

— Expanded View of the Stages —

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and Edwin S.
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"Successful generalization requires active, independent application and adaptation of the strategy across settings and tasks that vary in complexity and purpose."

This article, the fourth of four, presents the KU-IRLD staff's expanded view of the stages of the instructional process. Part One (*Strategram*, Vol. 3, No. 2) included a discussion of the critical factors which affect strategy performance, important instructional principles of strategy instruction, and Stage 1 (Pretest and Make Commitments) of the instructional process. Part Two (*Strategram*, Vol. 3, No. 3) included Stages 2 (Describe), 3 (Model), and 4 (Verbal Practice). Part Three (*Strategram*, Vol. 3, No. 4) included Stages 5 (Controlled Practice and Feedback) and 6 (Advanced Practice and Feedback). These articles are abstracted from an article entitled "An Instructional Model for Teaching Learning Strategies" by E. S. Ellis, D. D. Deshler, B. K. Lenz, J. B. Schumaker, and F. L. Clark which appeared in *Focus on Exceptional Children*, February, 1991.

Stage 7: Posttest and Make Commitments

This stage in the strategy-acquisition process, critical to application of the strategy, focuses on documenting mastery of the strategy by students and building a rationale to promote generalization of the strategy across settings. The first phase focuses on confirming that the strategy has been mastered and affirming success while the second phase focuses on forecasting generalization and making commitments related to both the student's and the teacher's role in generalization.

Phase 1: Confirm and celebrate mastery. This phase provides an opportunity to confirm and document that the procedural

and strategic processes involved in the strategy have been acquired by the student. The student should have an opportunity to prepare for and confirm, to the best of his or her ability and with maximum motivation and effort, that he or she can perform the strategy and meet the demand. To accomplish these goals, the teacher should:

1. Prompt students to identify that they have met the mastery criteria for the Advanced Practice Stage.
2. Arrange for a final confirmation of mastery when students have met the mastery criteria for the Advanced Practice Stage.
3. Inform the student that he or she will have an opportunity to perform the strategy in order to confirm mastery and to prepare by reviewing the strategy.
4. Provide the student with the appropriate task, and allow the student to complete the task under appropriate classroom conditions.
5. If the student confirms mastery by meeting the mastery criteria, the student should be congratulated by the teacher. However, if the student does not meet the mastery criteria, provide encouragement and feedback and arrange for continued practice.
6. Talk to each student about his or her achievement and review the effort and learning that contributed to his or her success.
7. Work with the student to identify and implement different ways to recognize the accomplishment.

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Phase 2: Forecast and commit to generalization. Within this instructional phase, the student and the teacher should make commitments related to ensuring that the student generalizes the strategy across settings, situations, and time. Therefore, the teacher must:

1. Explain the general goals of the generalization process.
2. Identify specific consequences related to focusing versus not focusing attention on the generalization process.
3. Explain the four phases of the generalization process and what will be involved in each phase.
4. Prompt the student to make a commitment to participate in and put forth maximum effort in the generalization process.
5. Explain the commitment of the teachers in assisting students in the generalization process.

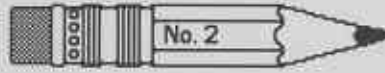
Stage 8: Generalization

For strategy instruction to be worthwhile, students must generalize the strategy to other settings. Successful generalization requires active, independent application and adaptation of the strategy across settings and tasks that vary in

"The content teacher must also assume responsibility for facilitating the generalization process."

complexity and purpose. Students must also be able to recognize naturally occurring cues across settings that signal appropriate opportunities for applying the strategy. Therefore, the instructional processes for promoting generalization must focus on enabling the student to: (a) discriminate when to use the strategy to meet everyday learning and performance demands, (b) develop methods for remembering

to use the strategy appropriately, (c) experiment with how the strategy can be used across circumstances encountered across settings, (d) receive and use feedback to develop goals and plans to improve performance, (e) adapt the strategy



to meet additional problems and demands, and (f) incorporate the strategy and various adaptations of the strategy into the student's permanent system for approaching problems across settings and time.

Phase I: Orientation. The purpose of this phase is to make the student aware of the necessity of applying the strategy purposefully to meet relevant setting demands and to help the student get prepared for the generalization process. The teacher should prompt students to:

1. Identify rationales for using the strategy across settings.
2. Explain why specific attention to strategy generalization is necessary.
3. Identify which settings are most likely to require use of the strategy.
4. Discuss how they might remind themselves to use the strategy in different settings.
5. Construct cue cards for content textbooks.
6. Specify cues that exist in specific settings and across settings that will signal use of the strategy.
7. Review different types of materials that they might encounter across settings and discuss how the strategy might or might not be applied.
8. Evaluate materials where the strategy should not be applied and discuss reasons why the strategy is not appropriate.
9. Discuss which aspects of the strategy seem to be most helpful and least helpful and

then discuss how this information can be used to increase performance.

10. Generate ways to improve or adjust the strategy to make it more responsive to setting demands.
11. Identify other strategies and procedures that might be combined with this strategy to make it more effective and improve overall performance.
12. Make cards with affirmations that connect use of the strategy with success in meeting a particular setting demand.

Phase II: Activation. The purpose of the Activation Phase is to prompt the student to purposefully use the strategy; monitor application of the strategy across a wide variety of

"The responsibility for promoting generalization must be shared by other individuals...with whom the student comes in contact across a variety of settings."

materials, situations, and settings; and to prompt appropriate application of the strategy when generalization does not occur. The responsibility for promoting generalization must be shared by other individuals, such as the

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Stratagram

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content teacher, with whom the student comes in contact across a variety of settings. The support-class teacher should prompt students to:

1. Apply the strategy to a specific assignment from another class and demonstrate how the strategy was used to complete the assignment.
2. Apply the strategy to a variety of assignments (homework, content classes) in other settings and demonstrate how the strategy was used to complete these assignments.
3. Set daily and weekly goals related to increasing the use of the strategy.
4. Develop a plan related to how to increase application of the strategy to meet these goals.
5. Review their affirmation cards daily.
6. Monitor the effects of using the strategy across different settings and situations.
7. Enlist the help of other teachers to solve problems related to applying the strategy.
8. Request feedback from content teachers related to improved performance in the areas addressed by the strategy.
9. Record progress related to applying the strategy and its results on measures of classroom performance.
10. Reinforce progress and success in the form of self-congratulatory statements and, if necessary, extrinsic rewards.



The content teacher must also assume responsibility for facilitating the generalization process. The primary instructional goals related to promoting strategy generalization in the content classroom are to: (a) help the student see the relationship between the demands of the setting and appropriate strategies and (b) guide the student to the automatic and independent identification and application of strategies to successfully meet setting demands. The content teacher must be informed of the types of strategies that will be acquired by the student and what skills are involved in performing each strategy. In addition, the support-class teacher and the content teacher should communicate regularly to determine the student's progress with regard to generalization of the pertinent strategy. The content teacher should be prompted to:

1. Obtain a short description of the strategy that has been taught, the criteria for successful application, and what the student has been taught with regard to

applying the strategy in content lessons.

2. Determine if the student has been taught to identify specific cues to indicate when a strategy or part of a strategy is to be used.
3. Evaluate teaching materials, presentation routines, and classroom activities to ensure that sufficient cues are available in order for the student to be able to identify when to use a specific strategy.

"...the support-class teacher and the content teacher should communicate regularly to determine the student's progress with regard to generalization of the pertinent strategy."

4. Determine which situations and activities in the content classroom best lend themselves to direct monitoring of strategy generalization.
5. Check to see if the strategy is being used.
6. Cue use of the strategy if the student has not started to use the strategy after several checks. Prompt the student to design his or her own cue card. More direct ways for cueing strategy use might include: (a) telling the student to use a particular strategy, (b) informing the whole class to use a particular strategy, (c) putting the name of the strategy on the chalkboard and pointing to it at appropriate times, and (d) prompting students who know the strategy to cue those who are just beginning to learn and apply the strategy.
7. Ask the student who does not respond to cues to list the steps of the strategy, ask how the first step would be accomplished, and/or watch the student perform the first step.
8. Model how the strategy can be applied to meet the content learning demand for the student who seems unable to perform the steps of the strategy and require the student to imitate the model.
9. Provide feedback to the student on the outcomes related to the use of the strategy as he/she applies the strategy.

Phase III: Adaptation. The purpose of the Adaptation Phase of Generalization is to prompt students to explore the strategy by identifying the various cognitive strategies in which they are engaging as the strategy is performed and to begin to change and integrate the elements of the strategy in order to meet new and different setting demands. As part of this phase, the teacher should prompt and guide students to:

1. Describe the strategy and all of its parts.
2. Discuss what they are doing and thinking about as each step of the strategy is applied.

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3. Identify the various cognitive strategies that are embedded in the strategy (e.g., clustering, monitoring, predicting, summarizing, etc.).
4. Describe what cognitive processes are involved in each of these strategies.
5. Discuss how and where these cognitive processes/strategies are required across settings.
6. Identify how the strategy can be modified to meet additional setting demands.
7. Write down the strategy modifications and how they can be used.
8. Repeat the orientation and activation activities needed to learn to apply the modifications.

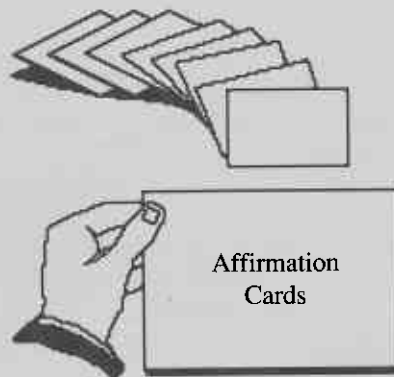
Phase IV: Maintenance. During the Maintenance Phase, designed to ensure that the student continues to use the strategy across time and contexts, the student and teacher jointly develop plans related to promoting long-term use of the strategy. The teacher should prompt students to:

1. Discuss rationales related to long-term use of the strategy.
2. Identify habits and barriers that might prevent them from continuing to use the strategy.
3. Determine how they might monitor long-term application of the strategy.
4. Discuss ways that the teacher can help to monitor long-term application and successful use of the strategy.

"Plan the procedures that will be used to improve performance if they are not applying the strategy effectively and efficiently".

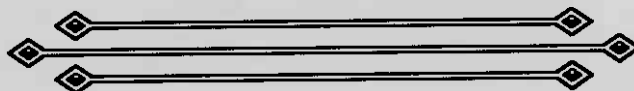
5. Set goals related to monitoring long-term application of the strategy.
6. Determine how many times a week the teacher should check use of the strategy.
7. Determine how this check will be conducted and if others will be involved.
8. Specify the criteria for successful performance of the strategy at the "check" points.
9. Plan the procedures that will be used to improve performance if they are not applying the strategy effectively or efficiently.
10. Review their affirmation cards daily.

11. Determine how long weekly maintenance checks will be needed before bi-weekly checks are implemented.
12. Identify when the strategy can be considered a permanent part of their approach to meeting setting demands and when maintenance checks will no longer be needed.



13. Develop a chart to record the results of efforts to maintain use of the strategy.
14. Identify self-reinforcers that can be used in conjunction with successful maintenance of the strategy.

Remember: The key to facilitating generalization rests in the ability of teachers to ensure that sufficient opportunities are available to the student to apply the strategy and to experience success in meeting setting demands.



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TEACHING THE HELPING VERBS

In response to our request for classroom tips used for teaching the helping verbs, several teachers submitted their ideas. In the next several issues of *Strategram*, we will share their tips.

Monica Geary and Janet Ploghoft, resource teachers at Culbreth Junior High School, Chapel Hill, North Carolina, have an excellent method of teaching LD students to memorize the 23 helping verbs. They use backward chaining in combination with clustering and fading. Here is their method!

1. The twenty-three helping verbs are listed on the board using clustering.

is	be	do	shall
am	being	does	should
are	been	did	will
was	has	may	would
were	have	might	can
	had	must	could

2. The class reads aloud all twenty-three verbs. After reading the list the first time, the last word from the list is erased and replaced with a line.

is	be	do	shall
am	being	does	should
are	been	did	will
was	has	may	would
were	have	might	can
	had	must	----

3. Then the class read the list aloud again. When they arrive at the line, the class states the missing word. Then the next to last word is replaced with a line. The class reads the entire list again and will name the last two words from memory. The class continues until all twenty-three helping verbs have been memorized!

Periodically, however, students will reach a tough spot. If the student has difficulty with a word, a fading technique is used. For example, let's say that your students have learned the words up to the word "must" (see below):

is	be	do	----
am	being	does	----
are	been	did	----
was	has	may	----
were	have	might	---
	had	must	----

Several of the students are having a difficult time remembering what word follows MIGHT. Use fading by leaving the first letter or two of the word and have the class read the entire list again. For example:

is	be	do	----
am	being	does	----
are	been	did	----
was	has	may	----
were	have	might	---
	had	mu--	----

Monica and Janet have used this technique called backward chaining for several years. This technique seems to help students remember the helping verbs from year-to-year. Try it out!

Accepting the Challenge of Strategies Integration

**by
Rosemary Tralli
Wethersfield, Connecticut**

Three years ago, the Strategies Intervention Model (SIM) was introduced into the secondary level resource programs in Wethersfield Public Schools, Wethersfield, Connecticut. Realizing that students have to develop learning strategies and self-advocacy skills in order to make effective transitions into college and other post-secondary experiences, SIM was adopted. Wethersfield resource teachers welcomed the change from a tutorial approach. SIM was compatible with the district philosophy and goals; it appeared that the process would be easy to adopt and implement.

With this approach came a new challenge of adapting to change. The change process permeated the district and needed to be assimilated at many levels in order to fulfill the district's commitment to SIM implementation. Even with the best intentions and commitment to the model, the change process became a powerful force which needed careful attention and monitoring.

Over the past three years of SIM implementation in Wethersfield, changes ranged from logistic procedures to attitudinal perspectives. Initial implementation procedures in Wethersfield have



included parental, administrative and general education involvement. Twenty-three special education teachers in the district are currently being trained in SIM. Wethersfield has indeed started an evolutionary process as it adopts the Model.

Certain factors have contributed to the success of Wethersfield's implementation process. These factors are addressed below and illustrate the dynamic force of collaboration in creating a strategic and effective learning environment.

Develop Teacher Competence and Confidence

This year, the second phase of SIM implementation, training expanded to include the majority of special educators in the school district; several transitional issues evolved. Teachers who were trained in SIM experienced a vast number of changes. They mastered new content, instructional

Develop Teacher Competence and Confidence

Begin with motivated students

Match strategy with setting demand

Seek support from key general educators

Develop support groups

procedures, and teaching techniques which are unique to the model. To facilitate the change process, these teachers were encouraged to use a variety of approaches which have already been applied successfully by the district's resource teachers.

As teachers began the implementation process, they were encouraged to initiate instruction with a select group of motivated students. In this way, the teachers were able to develop proficient skills in teaching a strategy without the interference of negative motivational and attitudinal factors.

Teachers were encouraged to begin strategies instruction in an area which corresponded with a major setting demand. In interviews, the support teacher and the content teacher analyzed course requirements to identify the skills that student needed in order to be successful in the classroom environment. The strategies which were taught related to a specific demand. This approach helped to create a collaborative learning environment which generated commitment and support between staff members.

Generalization is a stage which is often difficult for support teachers to accomplish and to track over time. In Wethersfield, the generalization procedures were initiated with a small, select group of general educators. By starting with content teachers who were supportive and flexible, SIM application was effectively managed and monitored. Once key teachers in the school began to witness the benefits of SIM, they became the advocates for the program. Other teachers then became interested in pursuing the approach, and they were willing to assist students through the generalization process.

To assist teachers during their initial implementation, support groups were developed within the district. Teachers were able to share and generate ideas, discuss their own classroom experiences, and assist each other in trouble-

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shooting. More experienced teachers were used as mentors for those educators who were learning to use the model. Through the use of sharing sessions and support groups, teachers were encouraged, and their energy was fortified.

Enlist Student Involvement

Students may be initially hesitant when the change is made from a tutorial to a strategic learning environment. Some students are set in their roles as passive learners and resist the change toward becoming actively involved and committed to the learning process. One of the most effective motivational avenues is to enlist the assistance of the students themselves.

Peer teaching is a technique which is motivating for both the learner and his peer "teacher." When a

Enlist Student Involvement

Use peer teaching

Use internal competition and, occasionally group competition

Invite students who use strategies to talk to other students

student demonstrated a sound understanding of a learned concept, he was asked to assist another student toward task mastery. The learner frequently responded with increased effort when his peer was instructing him; the result was that each student developed a commitment to the other's success in his given role.

Individual or group competitions were frequently used to motivate students. For example, during the Verbal Practice stage, the class was divided into teams; the team that achieved the highest mastery score earned free minutes at the end of class or a trip to the cafeteria for a snack.

Internal competition was also a successful motivating technique. When students charted their own performance scores on their Progress Charts, they were frequently motivated to achieve at higher levels. The daily experience of plotting achievement heightened the student's commitment to succeed and provided the student with regular positive feedback.

Another powerful force was to have graduates come back to visit their high school program. When these graduates talked about their college experiences, they frequently provided insight into the realities of the setting demands awaiting students in their post-secondary situations. This motivational avenue was very successful in changing student's perceptions and commitment to the model since

frequent concern centers around the lack of strategic preparation for college course demands.

Encourage Parental and Community Involvement

Parents are often hesitant and apprehensive about changes in their children's programs. They are commonly familiar with learning environments which nurture their children strictly through content support and review. In order to develop and foster parental understanding and cooperation, programs were initiated which dealt with key issues and concerns.

In Wethersfield, the local chapter of the Learning Disabilities Association of America was highly involved and enthusiastically supported the integration of SIM into the school system. This support was developed through presentations offered at local LDA meetings. Initial overviews of the model were presented, and, overviews of specific strategies were presented so that parents could assist in the generalization process at home and in other settings outside of school. This type of support was critical to the success of strategies intervention.

Another successful avenue in gaining support at the secondary level was to organize post-secondary planning workshops which included interviews with college admissions personnel. College admissions officers, in describing the characteristics of

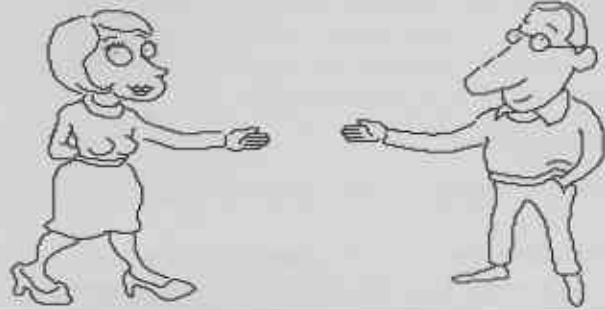
Encourage Parental and Community Involvement Involve local parental and professional organizations, such as LDA

successful learning disabled students, reiterated the philosophical underpinnings of SIM. When parents understood that their children must be independent learners and effective self-advocates, they appreciate and supported SIM integration. Their commitment and enthusiasm increased substantially.

The process of change in Wethersfield was a collaborative effort which fostered SIM implementation. This process was enhanced by the dedicated administrators, teachers, parents and students who strive to create a strategic learning environment. The shift toward integration of SIM was an exciting venture which should continue to challenge and satisfy Wethersfield Public Schools for many years to come.

Rosemary Tralli is a resource teacher and SIM Trainer at Wethersfield High School, Wethersfield, Connecticut.

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