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Self-Advocacy Strategy Instruction

*Enhancing Student Motivation,
Self-Determination, and
Responsibility in the Learning Process*

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Many general, remedial, and special education teachers have increasingly become aware of the need to directly address the motivation and personal responsibility of students for learning and/or improving their academic, social, and career-related skills. Consequently, some teachers have begun to use motivation strategies. Motivation strategies are techniques and procedures that involve students in key aspects of the teaching-learning process, thereby increasing the students' intrinsic commitment to learn. These strategies focus on helping students identify their own learning strengths. They also enable students to learn how to identify and prioritize their needs, choose and monitor

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their goals, and successfully work toward the attainment of goals. Thus, the term *motivation strategies* refers to specific processes that students can acquire and use to increase their interest in and efforts toward learning while gaining greater control over their own lives (Van Reusen, Bos, Schumaker, & Deshler, 1987, 1994).

Motivation strategies are important because they can be used to increase students' involvement in key decision-making and planning processes related to instruction and performance. These strategies enable students to decide what education and/or transition goals are important to them and can be used by teachers and others to help students understand and consider how their individual strengths, needs, and limitations affect their ability to successfully complete tasks. They also enable students to set goals and regulate their progress toward achieving their goals. Motivation strategies can provide students with a sense of direction, control, and ownership over the learning process, both in and out of school.

One example of a motivation strategy is *The Self-Advocacy Strategy for Education and Transition Planning*, also known as I PLAN (Van Reusen et al., 1994), which targets "an individual's ability to effectively communicate, convey, negotiate, or assert one's interests, desires, needs, and rights" (p. 1). The strategy assumes the importance of students' abilities to make informed decisions and take responsibility for those decisions. In addition, the idea of teaching students how to make effective learning and development decisions and use self-advocacy skills is based on research that has shown that students who have positive self-perceptions and perceived choice and control over their learning experiences are more willing and more motivated to work successfully with the adults in their environment than students who do not (Brown, 1988; Perlmuter & Monty, 1977, 1979; Schunk, 1982, 1985, 1989; see also Chapter 3).

Furthermore, by teaching students how to make effective decisions and by providing them with opportunities to make important learning and development decisions, they can be empowered to become active participants in directing their own futures and advocating for their own interests. However, *empowering students* does not mean providing them with complete freedom to do whatever they want whenever they please. Instead, it means teaching students how to make informed learning and development decisions and choices. It also means teaching students how to take responsibility for their decisions, choices, or actions and how to effectively advocate for themselves. Such instruction is directed toward increasing students' awareness and understanding that, regardless of the learning context or situation, ultimately they control what, how, how well, and why they learn. Before proceeding with an overview and description of *The Self-Advocacy Strategy for Education and Transition Planning*, a brief review of current research and information on student motivation patterns, school responses, and the critical links among intrinsic motivation, self-determination, and learning is appropriate.

STUDENT MOTIVATION PATTERNS

Research on the motivation characteristics of today's diverse school-age population indicates that students with and without learning, behavior, and developmental disabilities exhibit intra-individual patterns of motivation, attribution, and cognition for learning (Borkowski, Carr, Rellinger, & Pressley, 1990; Borkowski, Estrada, Milstead, & Hale, 1989; Maehr & Midgley, 1991; Pintrich, Anderman, & Klobucar, 1994). Studies examining children and youth with severe learning disabilities and students with behavior disorders have shown that some of these students, particularly those experiencing ongoing academic failure, often develop negative beliefs and behaviors in varying degrees that interfere with optimal learning (Adelman, 1978; Adelman & Taylor, 1983b; Chapman, 1988; Deshler, Schumaker, & Lenz, 1984).

In examining students' locus of control (i.e., whether one perceives control over life to be internally or externally mediated), Pascarella, Pflaum, Bryan, and Pearl (1983) found that students identified as having an internal locus of control demonstrated greater performance in less structured conditions than in more structured conditions, whereas students identified as exhibiting an external locus of control demonstrated greater progress in more structured conditions. In a review of research studies comparing the attributions of adolescents with and without learning disabilities, Huntington and Bender (1993) indicated that more adolescents with learning disabilities than their peers without learning disabilities tend to demonstrate an external locus of control orientation. In redirecting learning behavior, Edwards and O'Toole (1985) demonstrated the effectiveness of self-control instruction for students with behavior disabilities. Research has also demonstrated that some students with learning disabilities have lower self-concepts than their peers without disabilities, with greater decrements for academic self-concept than for general self-worth (for a review, see Chapman, 1988). In addition, students with mental retardation have also been found to exhibit differential patterns of motivation, field dependence/independence, and attributions for learning (Polloway & Epstein, 1985; Polloway & Smith, 1983; Reschly, 1987). These intra-individual patterns are believed to differentially influence students' behavior and academic performance in various instructional contexts, both in and out of school. Although teachers and other professionals often acknowledge student motivation and responsibility for learning, these behaviors are infrequently addressed in many educational settings.

Even when students possess the cognitive, linguistic, social, and academic skills necessary to learn new skills, acquire information, or complete tasks, some students exhibit a pattern of behavior referred to as *learned helplessness* (Seligman, 1975). This behavior is characterized by low expectation of success and an insufficient amount of time and effort expended toward the completion of tasks or assignments. It is also characterized by the beliefs that

failures are caused by skill impairments or lack of ability and that successes are due to external events beyond the student's control (Chapman, 1988; Pascarella et al., 1983; Pintrich et al., 1994). For example, some students may believe that their poor school performance is caused by the amount and complexity of assigned tasks or the quality of instruction that teachers provide rather than by internal, controllable factors such as the use of effective learning skills and strategies, time management skills, and the ability to monitor and regulate one's efforts and progress. As a result, some students are believed to demonstrate apathy toward learning new skills or trying new tasks, and some fail to set goals for themselves. Others may begin but set unrealistic goals for themselves and quit when their expectations are not met. Still other students, although appearing to spend time on tasks, may engage in mindless or unproductive learning by participating passively in the learning process (Bryan, 1986; Licht & Kistner, 1985; Torgesen, 1982). Some may even use verbal and nonverbal defiance, aggression, or antisocial behaviors and actions to avoid tasks. Indeed, there are students who simply choose not to participate in the learning process even when the tasks or assignments are developmentally appropriate and relevant. Students with chronic or pervasive learning and motivation problems are often placed in remedial, alternative, and special education programs in elementary and secondary schools and later in vocational and rehabilitation counseling programs.

The dilemma for many of these students is their dependency on teachers, parents, peers, and others for direction, decision making, goal setting, problem solving, feedback, and reinforcement as they move through various school settings and into adulthood. To help those students acquire the skills and behaviors needed to effectively learn or work independently as well as interdependently with others, less structured situations are suggested. However, such contexts are usually the very situations in which these students experience difficulty. Moreover, when teachers, parents, and others provide highly structured situations in which all goals and decisions are made for the students, they may be perpetuating students' dependency. In short, many of these students become dependent on teachers and parents, instructional conditions, materials, or accommodations to demonstrate progress that can undermine their development and use of self-directed behavior and independent learning or performance.

Unfortunately, such problematic motivation characteristics (e.g., negative beliefs, learned helplessness, lack of interest or effort, passive learning, learning dependency, avoidance behaviors) about learning and school can continue into adulthood with serious consequences. For example, in far too many instances, students with learning disabilities and behavior problems quit or graduate from high school without realistic goals or plans for the future such as additional training or schooling. Many are unprepared or underprepared for the responsibilities of adult life, including personal and professional relationships, employment, and full participation in their communities. To the con-

trary, capable learners perceive their successes and failures in and out of school as being the result of controllable factors such as the degree to which they set and work toward goals. These students are resourceful, persistent, and committed to practice and mastery of the learning process. Capable learners are volitional in that they resist distractions as well as direct and regulate their thinking and behavior. Furthermore, these students arrange their physical and social contexts to facilitate successful performance. They are also found to invest the time, effort, and energy necessary to complete tasks, and they monitor and evaluate their progress toward the attainment of goals (Zimmerman, 1994; Zimmerman, Bandura, & Martinez-Pons, 1992).

School Responses to Student Motivation Problems

When confronted with student motivation problems, many school programs have directed their efforts toward changing or manipulating factors within the learning context, outside of student control (i.e., external or extrinsic manipulation). For example, many teachers and researchers use and recommend the use of behavior management interventions that are based on principles of operant conditioning. These interventions focus on the use of positive (external) reinforcement systems (Deutsch-Smith & Pedrotty-Rivera, 1995; Repp, Felce, & Barton, 1991; Shores, Gunter, Denny, & Jack, 1993), and they usually involve reward systems (i.e., token economies, point systems, verbal praise) that are used to increase the amount of time spent on tasks and enhance assignment completion, response rates, and appropriate behavior. The tokens or points are then exchanged by students for privileges at school or at home. These systems are also used to decrease or eliminate inappropriate behaviors. For example, teachers and others may use a response cost procedure in which a specified amount of a reinforcer is removed or applied following a particular behavior. Through these systems, students earn tokens or points for exhibiting desired behaviors and completing assignments and tasks, and they can lose their tokens or points for failing to complete assignments or for disruptive behavior.

Limitations of External Controls

It is important to recognize that though behavior management interventions can be very effective and necessary for eliciting desired behaviors from some students, they also have several limitations. First, a heavy reliance on rewards may increase student dependence on external reinforcement (Lepper, 1988; Lepper & Greene, 1978; Lepper, Greene, & Nisbett, 1973; Lepper & Hodell, 1989). In essence, some students may be willing to put forth time and effort or to complete tasks only when rewards are available. Second, some research indicates that external reinforcement systems often cannot be faded without simultaneously decreasing student performance (Kazdin, 1982; O'Leary & Drabman, 1971). Third, for some students with developmental delays or severe language and learning problems, the use of external positive reinforce-

ment (e.g., rewards, verbal praise) in combination with interactive modeling strategies may produce confusion. That is, some students may be uncertain about what behavior is being reinforced, or the reinforcer (including verbal praise) may serve as a distraction (Biederman, Davey, Ryder, & Franchi, 1994). Fourth, the use of external controls may actually interfere with the students' intrinsic motivation for acquiring skills and knowledge, a circumstance that can undermine the development and maintenance of the ability to independently work, learn, or complete tasks.

By primarily emphasizing external control mechanisms, many school programs and teachers overlook intra-individual patterns of student motivation and the critical role of intrinsic motivation and self-determination in developing or enhancing learner independence. In addition, many programs do not differentiate instructional or behavioral interventions based on the students' motivation patterns or belief systems. These programs often fail to help students establish or alter their belief systems about the value of learning and school. Many programs do not include students in the determination of their learning needs and responsibilities or do not involve them in the process of developing goals for improving performance both in and out of school.

INTRINSIC MOTIVATION, SELF-DETERMINATION, AND LEARNING

Theorists and researchers involved in the study of motivation (e.g., Boggiano et al., 1992; Cameron & Pierce, 1994; Deci & Ryan, 1985; Mook, 1987) have described intrinsic motivation as an important energizer of human behavior that is believed to be based on the individual's need for competence and self-determination (i.e., internal control). In other words, individuals are described as intrinsically motivated when they complete activities or exhibit behavior because of an inner desire to succeed or to act appropriately (i.e., competence) and act out of choice based on perception of need (i.e., self-determination). More important, intrinsic motivation and self-determination are believed to have a critical role in the human ability to understand and regulate one's own behavior and actions (Deci & Ryan, 1985; Spaulding, 1992; Weiner, 1980). Thus, when students perceive themselves as competent and self-determining in their learning attempts, they are more likely to commit themselves and to direct their efforts toward the attainment of learning goals or the successful completion of tasks. In many schools and classrooms, students may be viewed as intrinsically motivated when they are minimally compliant and cooperative in working on tasks, completing assignments, or learning new skills. Those who are frequently noncompliant or who fail to direct their efforts and effectiveness toward meeting classroom expectations are often described as unmotivated or inactive learners (Adelman & Taylor, 1983a, 1983b; Torgesen, 1982).

In emphasizing self-determination as an important outcome for children and youth with disabilities, Wehmeyer (1996) defined *self-determination* as

the attitudes and abilities necessary to act as the primary causal agent in one's life and to make choices and decisions regarding one's quality of life, free from external influences or interference. Furthermore, Wehmeyer (1992, 1995, 1996) and Wehmeyer and Schwartz (1997) contended that self-determination is predicated on the individual's acquisition and use of specific skills, behaviors, and attitudes that are learned across the life span and associated primarily with reaching adulthood and fulfilling adult roles.

More specifically, Wehmeyer (1996); Wehmeyer, Kelchner, and Richards (1996); and Wehmeyer and Schwartz (1997) posited that for the emergence of self-determination to occur, students need to acquire or develop a compilation of skills, behaviors, attitudes, and beliefs. Wehmeyer (1996) and Wehmeyer et al. (1996) referred to this compilation as the *components or essential elements of self-determination*. This compilation involves the degree to which individuals are metacognitively, motivationally, and behaviorally autonomous in directing, monitoring, and regulating their thoughts, actions, or behaviors. It also includes but is not limited to engaging in actions or activities based on one's self-knowledge or awareness of strengths, limitations, interests, preferences, or abilities. It includes the ability to solve problems, set and attain goals, exhibit an internal locus of control, demonstrate positive attributions of efficacy and outcome expectancy, and reward oneself when goals are attained or tasks successfully completed. This compilation also encompasses the ability to identify one's current and future needs, gain access to and use information and resources, plan and complete tasks, expend personal time and effort, and take responsibility for one's actions or behaviors. It involves acting on one's beliefs and using verbal and nonverbal skills necessary for effective communication, including knowing how and when to ask questions, compare ideas, be assertive or persistent, negotiate, and/or make informed decisions and choices. These interrelated skills, behaviors, and attitudes are all sufficiently complex, and their acquisition or development can be difficult for many students. In short, concerns about student motivation, involvement, and responsibility in the teaching-learning process along with the postschool outcomes of students with disabilities, particularly those with learning disabilities and behavior problems, have elevated the critical link of intrinsic motivation and self-determination in the effectiveness of intervention programs for students receiving general, special, or remedial education (Bos & Van Reusen, 1991; Carter-Ludi & Martin, 1995; Ellis, Deshler, Lenz, Schumaker, & Clark, 1991; Field, 1996; Hoffman & Field, 1995; Martin & Huber Marshall, 1995).

Implications for Enhancing Students' Intrinsic Motivation and Self-Determination

When applied to the motivational characteristics of students with disabilities and others at risk for failure in school, the constructs of intrinsic motivation and self-determination have two major implications. First, if education and/or

transition programs for this population are to be effective, these students need to be taught how to reflect, explore, and act on their beliefs about the causes of their success or failure, both in and out of school. Second, efforts to address the intrinsic motivation and self-determination of these students require teachers, parents, and others to recognize the need for students to be involved in determining and advocating for their learning and development needs, outcomes, and experiences. Indeed, these students need ongoing opportunities to actively and directly participate in planning, carrying out, and monitoring their individualized education programs (IEPs) and/or individualized transition plans (ITPs) (see Chapter 3). Thus, efforts to enhance the intrinsic motivation and self-determination of students may need to be directed in a twofold approach. This approach includes teaching students how to make decisions about their learning and development needs and providing them with opportunities to make decisions or choices.

Creating Opportunities for Student Decision Making and Success

As noted in Chapter 3, it must be emphasized that teaching students how to make effective decisions and choices is of little value unless schools, teachers, parents, and others provide real opportunities and experiences for students with disabilities and others with learning and performance problems to engage in active and responsible decision making. Specifically, students need to have a major voice in making decisions and choices regarding their IEPs and ITPs. More specifically, they need to be actively involved in making decisions and choices before, during, and after instruction. Concurrently, students need opportunities in which they are given responsibility for their decisions and choices. In this way, the instruction process is guided and driven by students' goals, not by teachers' goals.

Teachers, other education professionals, and parents who want to enhance students' intrinsic motivation, self-determination, and responsibility for learning and development must be willing to create and maintain environments that promote and provide students with opportunities for success. Providing opportunities or situations in which students with disabilities and others can make decisions and choices but have little chance of attaining success is unproductive. Similarly, it is important to recognize that differences exist in students' individual perceptions of education and transition needs, goals, skills, beliefs, and motivations. These differences need to be identified and accommodated.

One way to accommodate or to address such differences is to examine available instruction programs or services to make sure that a variety of materials, content, and options for learning and development opportunities are offered. Nonetheless, if students have the capacity and are given opportunities to make decisions and choices but are not permitted to pursue those decisions or choices, then their interest and effort in working toward their goals will be un-

dermined. Keeping this twofold approach in mind helps to maintain students' perceptions of choice, control, commitment, and effort to learn and achieve in school and in life. The Self-Advocacy Strategy described and presented in the remaining sections provides teachers, parents, and students with a framework for teaching students the skills and behaviors needed to make plans and carry out those plans. These skills help students to make successful transitions within and between education settings and to the work force, adult life, and their communities.

THE SELF-ADVOCACY STRATEGY FOR EDUCATION AND TRANSITION PLANNING

The Self-Advocacy Strategy for Education and Transition Planning was designed to increase student participation, decision making, and communication during IEP/ITP conferences (see Van Reusen & Bos, 1990, 1994; Van Reusen et al., 1987; Van Reusen, Deshler, & Schumaker, 1989). This research-based strategy was revamped, improved, and updated to more effectively address the complex education and/or transition concerns of students with disabilities and others who exhibit learning and performance problems. The updated version was created to better assist students, parents, teachers, and others who are involved in planning and carrying out the requirements of IEPs and ITPs. This strategy also incorporates developments in strategic instruction, motivation, self-determination, and self-advocacy research. Many of the changes found in *The Self-Advocacy Strategy* stem from invaluable feedback and suggestions provided by the students, parents, teachers, researchers, and other professionals who used the original strategy.

Purpose of The Self-Advocacy Strategy

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 emphasizes the role and importance of intrinsic motivation and self-determination by focusing students' attention on their learning and transition skill strengths. Third, mastery of the strategy prepares 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 needs and goals.

Focus of Instruction

Instruction in *The Self-Advocacy Strategy* is specifically designed to increase students' investment in their own learning, their intrinsic motivation, and their

commitment to learn. Furthermore, although students can use this strategy to prepare for and participate in any type of conference or meeting, the focus of instruction is on 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 determine their education and/or transition strengths, areas in which they can improve or learn, and choices for learning or needed accommodations. In addition, 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 needs in areas such as 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 recreational skills. Moreover, they learn how to communicate this information in a productive manner during conferences or meetings and take an active role in making decisions. Thus, the instruction provides students, parents, and others with a strategic system or framework for making plans and carrying out those plans related to successful educational experiences and transitions from school to adult life, community settings, and the work force.

The strategy comprises five steps called the I PLAN steps and five communication behaviors called the SHARE behaviors. These steps and communication behaviors form the strategic system previously mentioned. The acronym I PLAN is used to help students remember the five steps involved in the strategy (Table 1). Each letter in I PLAN cues students to use each step of the strategy. Students also learn how to use the SHARE behaviors, which are basic techniques for effective communication (Table 2).

The Self-Advocacy Strategy is also centered on specific instruction procedures, materials, and activities for preparing students to actively participate in two types of conferences: education-planning conferences and transition-

Table 1. The steps of The Self-Advocacy Strategy

Step 1	Inventory your
	Strengths
	Areas to improve or learn
	Goals
	Choices for learning or accommodations
Step 2	Provide your inventory information
Step 3	Listen and respond
Step 4	Ask questions
Step 5	Name your goals

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Table 2. SHARE behaviors from The Self-Advocacy Strategy

S	Sit up straight
H	Have a pleasant tone of voice
A	Activate your thinking
	Tell yourself to pay attention
	Tell yourself to participate
	Tell yourself to compare ideas
R	Relax
E	Engage in eye communication

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planning conferences. In some states and school districts, these conferences are conducted independently of each other. In other states and school districts, education- and transition-planning conferences or meetings take place simultaneously. In deciding which type of conference to conduct, those wanting to teach this strategy should think about their students and whether they need to focus primarily on education planning, transition planning, or both. For elementary school-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 more appropriate. For middle school, junior high, or high school students, both education- and transition-planning conferences may be appropriate. In any case, it is important to remember that all students who are determined to be eligible for special education services are required by federal regulations to have an IEP that is developed in a planning conference before they are placed in a special education program and before they receive any special education services. In addition, students receiving special education services are required to have transition goals addressed in their IEPs by the time they are 14 years old.

Because of the major differences between the two types of conferences and the different needs of students, three different inventories were developed for use in teaching the "T" step of the strategy. These inventories are an education inventory with education skill lists, a modified education inventory called My Personal Inventory (for younger students in Grades 2-5), and a transition inventory (for students in middle, secondary, and postsecondary schools) with transition skill lists. Depending on the unique individual needs and ages of students, either one of the inventories is selected or parts of the inventories are selected and combined into an inventory that is then completed by students individually during the third stage of the instructional sequence (see the next section) but prior to their participation in a meeting or conference. The teacher or other students provide assistance to students who have difficulty in providing written responses. Regardless of the inventory used, this step of the strategy provides students with a decision-making process for determining and

listing their perceived education and/or transition strengths, areas for improvement or learning goals, needed accommodations, and choices for learning. Students then use this information as they learn to become active participants in advocating for and negotiating their own futures across various settings and contexts.

The Self-Advocacy Strategy was written to reflect the knowledge and technology involved in providing effective strategic instruction to increase acquisition and generalization. Therefore, teachers, parents, and others will find the strategy to be organized around the instructional stage model (see the next section), with each stage using lesson organizers to promote student learning, goal attainment, and use of the strategy.

THE INSTRUCTION SEQUENCE

The Self-Advocacy Strategy is taught by using a modified version of the acquisition and generalization stages that were developed and expanded as part of the Strategic Intervention Model (SIM) (Ellis et al., 1991). Students with disabilities and others with learning and behavior problems who participated in field test studies of the strategy demonstrated mastery when the instructional stages, as presented in Figure 1, were implemented. The description in the next section summarizes the instruction stages and sequences used to teach the strategy.

Instruction Stages

Stage 1: Orient and Obtain Commitment to Learn During this stage, students are introduced to the concept of education and transition planning, the purpose of The Self-Advocacy Strategy, and how learning this strategy can give them more power and control over their own learning and development, both 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 the students. In working with older students, experience has shown that student effort and involvement in the instruction process is greater when students make a verbal or written commitment and the instructor or teacher makes a similar commitment.

Stage 2: Describe This stage is designed to provide students with a picture that details the nature of skills to be taught and the advantages of using those skills. First, students are provided with definitions of IEP and/or ITP conferences. Next, the types of meetings or conferences in which students are likely to participate and the characteristics of those meetings are described. Then students are shown how they can personally benefit from applying The Self-Advocacy Strategy in the meetings or conferences they attend as well as in day-to-day situations. During this stage, an interactive format is used. Students are presented with situations and settings in which using the strategy made

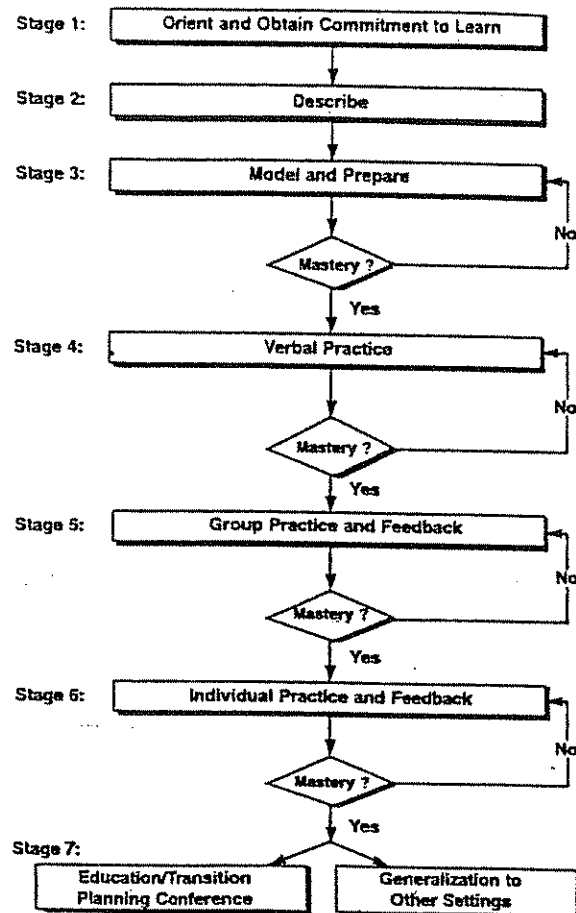


Figure 1. Instruction stages of The Self-Advocacy Strategy. (From Van Reusen, A.K., Bos, C.S., Schumaker, J.B., & Deshler, D.D. [1994]. *The Self-Advocacy Strategy for Education and Transition Planning* [p. 129]. Lawrence, KS: Edge Enterprises; reprinted by permission.)

a difference for other students. Discussion with the students about the kinds of results and advantages that can be attained by learning and using the strategy has been found to enhance student commitment, interest, and strategy use.

Stage 3: Model and Prepare Students learn a skill better if they can see and hear others perform it first rather than just receiving a description of what to do. In other words, they learn the skills by imitating good models. Therefore, the I PLAN steps of the strategy are demonstrated in this stage. The instructor or teacher needs to use a "think aloud" teaching format or routine for students to hear someone verbalize the necessary cognitive processes and see the overt behaviors used to perform the strategy. The "I," or "inventory,"

step of I PLAN requires the longest time to model because in it students complete their education or transition inventory. Owing to the time requirements (three 40- to 50-minute lessons), instruction during this stage is designed so that first each part of the inventory step is modeled and then the students complete that part. When the demonstration of the inventory step is concluded, the students have a completed inventory that they bring to their IEP and/or ITP conferences. After the inventory is completed, the remaining steps of the strategy, which focus on learning how and when to communicate during a conference or meeting, are demonstrated. In this manner, all of the I PLAN steps, the cognitive processes, and the overt behaviors involved in performing the strategy steps are presented clearly and explicitly.

As stated previously, the model-and-prepare stage requires the most time to complete because the students complete an inventory as part of this instructional stage. In view of the fact that differences exist in the scope and purpose of IEP and ITP conferences, The Self-Advocacy Strategy contains two different model-and-prepare stages. If a decision is made to combine the two conferences into the same conference, components of the IEP inventory and the ITP inventory can be selected to reflect the unique needs of a student. For example, the social skills planning section of the education inventory might be omitted because the ITP inventory contains a social and family living section. Components of the ITP inventory may be selected because they may be more appropriate for some students. For instance, a student's ITP inventory may reflect his or her needs to focus on independent living skills, whereas another student's ITP inventory may focus primarily on financial and consumer skills or community involvement skills.

Stage 4: Verbal Practice Prior to actual use of the strategy, students should be able to accurately name the strategy steps and communication behaviors in detail, including where, when, and how they can use the strategy. Specifically, this instructional stage is used to ensure that students know what to do and how to act during each step of the strategy. Through an interactive questioning process, students are first asked about each of the I PLAN steps and where, when, and why they need to use each step. Next, they are asked to verbally rehearse the I PLAN steps and SHARE behaviors. This instructional activity helps facilitate students' independent use of the strategy in the future. The verbal practice activities (i.e., elaboration and rehearsal) provided in this stage can be quickly and effectively carried out with groups of students through rapid-fire exercises in which the instructor points to students in succession and each student names or explains a strategy step or answers a specific question about the strategy. Once students demonstrate their knowledge about the strategy steps and each step's purpose, they can practice individually or in small groups. Students practice in this manner until they can name and explain the steps and associated behaviors without help. Each student's knowledge is evaluated individually and recorded on a checklist.

Stage 5: Group Practice and Feedback After students demonstrate both understanding and mastery of the steps, behaviors, and concepts of the strategy, they participate as a group in a simulated conference. In this stage, the instructor first reviews what takes place during a particular type of meeting or conference, including who might participate and what the student's responsibilities involve. Next, the instructor conducts a simulated conference or meeting by directing questions and statements to individual students in the group and requiring a response from the student being questioned. After each response, the instructor and the other students provide corrective feedback on how each student effectively 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, or referred to his or her inventory). During this step, a group practice score sheet is used to score each student's performance. Simulated practice activities continue until the students consistently use the strategy effectively.

The use of corrective feedback during this stage is perhaps the most important element of the instruction process. Research has shown that students make the greatest gains when they receive specific, well-timed feedback. Students with learning disabilities often continue to perform or practice incorrect responses, thus delaying mastery without such feedback. To facilitate the corrective feedback process, audiotaping or videotaping simulated conference activities and having students listen to or watch some of the responses and comments can be very helpful. Similarly, the audio- or videotaping of the simulated conference is also useful in the next stage of instruction.

Stage 6: Individual Practice and Feedback In this stage, the instructor or teacher meets with students individually to allow for individual practice, corrective feedback, and mastery. First, the student's participation in the simulated conference (conducted in Stage 5) is reviewed. The student is asked to self-evaluate his or her performance during the simulated conference, and then the instructor provides corrective feedback regarding the student's use of the strategy steps and the communication behaviors. Next, the strategy steps and communication behaviors are reviewed once again. Then another simulated conference or meeting is conducted with the student in a one-to-one format. Corrective feedback and additional practice for the student are provided as needed. As in the previous stage, audio- or videotaping individual simulated conferences facilitates the provision of corrective feedback. This type of individual practice and corrective feedback continues until the student demonstrates mastery, which typically requires 10–15 minutes. Finally, the student is given an opportunity to ask questions about the specific type of conference or meeting in which he or she will participate, and then the instructor provides a quick last review.

Because this stage is designed to promote acquisition durability of the strategy, the instructor or teacher needs to reduce the amount of prompts and

cues provided in earlier stages. Using this fading technique, each student becomes more responsible for taking the initiative and becomes more actively involved in using the strategy. Individual corrective feedback during this stage of the instruction sequence is just as critical as during the earlier stages. However, instead of the instructor or teacher assuming the major responsibility for the corrective feedback process in this stage, the student becomes responsible for reflection, self-regulation, and self-evaluation. This is accomplished by asking the student questions about his or her use of the strategy steps and communication behaviors, thereby enabling the student to reflect on and analyze his or her effectiveness in applying the strategy.

Stage 7: Generalization to Other Settings Mastering The Self-Advocacy Strategy serves little purpose unless it is used at intended times and in intended settings. In other words, the critical measure or "acid test" of effective instruction is the degree to which students can apply the strategy in the real world and maintain as well as adapt its use over time. This concept is known as *generalization*. Therefore, in this stage, students are ready to use the strategy independently during actual conferences or meetings, and they are given assistance in adapting the strategy to a variety of meetings or conferences (i.e., job interviews, performance evaluations, negotiating with parents, club or team meetings). Three distinct generalization phases are addressed in this stage. The first phase, Preparing for and Conducting a Planning Conference, provides students with individual opportunities to directly apply their acquired self-advocacy skills in an IEP or ITP conference. The second phase, Preparing for Other Uses of the Strategy, makes students aware of other formal and informal situations or circumstances in which they can apply the strategy, as well as ways in which they may need to adjust the strategy. The third and final phase, Preparing for Subsequent Conferences, is used with students to review the purpose of particular conferences or meetings and the importance of their participation. Again, students are provided with a review of the strategy and an opportunity to update their IEP and/or ITP inventories. This generalization stage is also used to ensure that the students have maintained their understanding and use of the strategy before participating in any subsequent meetings or conferences in which they need to advocate for themselves.

Related Concepts and Skills Embedded in the Strategy

Students acquire numerous related concepts and skills embedded in the strategy. These related concepts and skills are believed to be important to the construct of *self-regulation*, in which students monitor their own thinking, behavior, or actions through language mediation while learning. Subsequently, students are expected to take active roles in learning the strategy by first describing overtly the steps and behaviors of the strategy during the instruction process. Once they have demonstrated mastery, the focus of instruction also addresses the need for students to adapt the strategy to various situations by

covertly using corrections or fix-up strategies and techniques when problems are encountered. Through this process, a deliberate progression of instruction from teacher- to student-mediated instruction during Stages 4-7 of the instruction sequence emphasizes the importance of self-regulated behavior on the part of students. Other related concepts and skills embedded in the strategy include

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

Opportunities for Student Self-Advocacy in and out of School

Students have a variety of formal and informal opportunities to advocate for themselves in responding to an intricate network of learning, performance, and social demands or expectations. For example, formal planning conferences occur routinely in special, remedial, and general education programs. These conferences provide excellent opportunities for students to engage in self-advocacy and make decisions and choices regarding their learning and development needs and experiences. They include the IEP planning conference, the ITP planning conference, and the individualized vocational education program (IVEP) planning conference, to name a few. Unfortunately, some research has demonstrated that the majority of these conferences are mechanical and compliant at best and that students are rarely given the opportunity to participate in them, let alone be included in the decision-making process related to instruction, intervention, or placement decisions (Smith, 1990a, 1990b). Once students have learned The Self-Advocacy Strategy sufficiently, they can use it to prepare for and participate in an array of conferences, perhaps making the conferences more beneficial for everyone involved.

Similarly, students often meet with school counselors on a more informal basis to plan class schedules or to prepare for their futures. These informal conferences may include discussions about college or other postsecondary training. In these situations, students are routinely asked to make decisions

about, as well as to plan for, their current and future needs and goals. Likewise, teachers and administrators across the grade levels often request informal conferences with parents or guardians at which students are asked to be in attendance. In these situations, students' abilities to rationally communicate and advocate a course of action may be the difference between their willingness to change or modify their behavior and efforts and their continuing to have difficulties and problems in school.

Inside the classroom, students are routinely confronted with situations that often require them to advocate a course of action. These situations include daily informal interactions with their peers, working with other students on assignments, asking questions, providing information, comparing information and ideas, or setting goals. Similarly, outside the classroom and particularly in unstructured situations, students have many more opportunities to interact with each other and make decisions or choices. These situations and opportunities include transition or breaktimes between classes, lunchtime in the cafeteria, recess, and after-school activities. In all of these situations, students may find themselves in circumstances in which they must self-advocate. More specifically, most of these circumstances and situations require students to use some if not all of the I PLAN steps and the SHARE communication behaviors.

In the same way, students frequently find themselves in situations outside of school where they need sound self-advocacy skills. Some of these situations include meeting informally with their parents or guardians to resolve a problem or to negotiate permission. Another common situation involves choosing a place to go to or an activity to do with friends that will not result in negative consequences. Perhaps more important are those situations where the ability to self-advocate may be critical for one's success, including knowing how to prepare for and participate in a job interview or performance evaluation. In the community, people often find themselves as consumers having to advocate a course of action, such as getting a refund or cash credit for or exchanging an item previously purchased that needs to be returned for some reason.

Sometimes, as a result of poor decision making or choice of actions, students find themselves in trouble with the law and become adjudicated and thus need to meet with judges, court-appointed social workers, probation officers, or youth evaluators. In these situations, their ability to advocate a course of action may result in their not being incarcerated. In summary, students are confronted with numerous situations and circumstances in which the ability to successfully self-advocate and be active participants in the decision-making process directly affects their education and other life experiences.

CONCLUSIONS

The Self-Advocacy Strategy for Education and Transition Planning is an effective tool that can be used to involve students, both young and old, in plan-

ning their IEPs and/or ITPs, with the ultimate goal being increasing their intrinsic motivation, self-determination, and responsibility in the learning process, both in and out of school. This strategy focuses on helping students to determine and verify their beliefs about their education and transition strengths, make informed learning and development decisions, and advocate for themselves. The strategy is used to teach students to identify and prioritize needs; to set and attain goals; and to increase their interest in, effort toward, and commitment to learning and performing. In providing students with opportunities to learn and use decision-making and self-advocacy skills, teachers, parents, and other professionals can better prepare students with disabilities, as well as those with learning and performance problems, to become full participants in their communities and in society.

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