The Self-Advocacy Strategy

Authors: Anthony K. Van Reusen, Candace S. Bos, Jean B. Schumaker, Donald D. Deshler

KU-CRL SIM© Learning Strategies Professional Developer
Teresa Cockerham, Ed.S., Forsyth County School System
Self-Advocacy refers to the ability of an individual to effectively communicate, convey, negotiate, or assert one's own interests, desires, needs, and rights. It assumes the ability to make informed decisions. It also means taking responsibility for those decisions. Providing students with opportunities to learn and use decision-making and self-advocacy skills can help prepare them to become full participants in a democratic society.
Transition Services Defined
P.L. 101-476

“Transition Services” means a coordinated set of activities for a student, designed within an outcome-oriented process, which promotes movement from school to post-school activities, including post-secondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation.
The coordinated set of activities shall be based upon the individual student’s needs, taking into account the student’s preferences and interests, and shall include instruction, community experiences, the development of employment and other post-school adult living objectives, and, when appropriate, acquisition of daily living skills and functional vocational education.

(PL 101-476, 602 [a][19])
IDEA Legislation 1997
Transition Services

- Coordinated set of activities for a student
- Designed within an outcome-oriented process
- Promotes movement from school to post-school activities
Coordinated Set of Activities

- Based upon:
  - The individual student's needs
  - The student's preferences and interests
  - Instruction, community experiences for employment
  - Adult living goals
  - Acquisition of daily living skills
  - Vocational evaluation
Pertinent Setting Demands

- Student participation in education and/or transition planning conferences
- Student participation in classes, clubs, meeting, and school activities; job interviews, locating and using services and resources
- Student participation in meetings with teachers, counselors, administrators, and employers
- Student participation in the community
Rationales

- The **Self-Advocacy Strategy** teaches students how to be active participants in making choices and decisions about their education and transition into adulthood.

- The **Self-Advocacy Strategy** provides students a sense of competence and control (self-determination) over the learning and development process and over the direction of their future.

- The **Self-Advocacy Strategy** provides students a set of communication skills and behaviors that can be used in a variety of settings and circumstances.
Results

Trained Students

Comparison Group

<table>
<thead>
<tr>
<th>Percentage of Goals Appearing on IEP Specified by Student During IEP Conference</th>
</tr>
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<tbody>
<tr>
<td>Trained Students</td>
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<tr>
<td>Comparison Group</td>
</tr>
<tr>
<td>86%</td>
</tr>
<tr>
<td>13%</td>
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</table>
Strategic Instruction Model
Curriculum Components

- Task-Specific Learning Strategies
- Executive Strategies
- Social Skills Strategies
- Motivation Strategies
- Transition Strategies
THE SELF-ADVOCACY STRATEGY

INSTRUCTIONAL SEQUENCE

Stage 1: Orient and Obtain Commitment to Learn

Stage 2: Describe

Stage 3: Model and Prepare

Stage 4: Verbal Rehearsal

Stage 5: Group Practice and Feedback

Stage 6: Individual Practice and Feedback

Mastery

No

Yes

Education
Planning
Conference

Generalization to other settings
Student Folder Contents

Front Cover: Progress Chart

Eventual Contents:

Cue Cards
Inventory Sheet
Worksheets
Skill Lists
Verbal Practice Checklist
Individual Mastery Checklist
# Self-Advocacy Strategy Progress Chart

<table>
<thead>
<tr>
<th>Stage</th>
<th>Completion Date</th>
<th>Mastery Met</th>
</tr>
</thead>
<tbody>
<tr>
<td>STAGE 3A: MODEL, LESSON 1</td>
<td></td>
<td></td>
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<tr>
<td>STAGE 3A: MODEL, LESSON 2</td>
<td></td>
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<td>STAGE 3A: MODEL, LESSON 3</td>
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<td>STAGE 3B: MODEL, LESSON 1</td>
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<td>STAGE 4: VERBAL PRACTICE</td>
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<tr>
<td>STAGE 5: GROUP PRACTICE</td>
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<td>STAGE 6: INDIVIDUAL PRACTICE</td>
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<tr>
<td>STAGE 7: GEN., PART I</td>
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<td>STAGE 8: GEN., PART II</td>
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<tr>
<td>STAGE 9: GEN., PART III</td>
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</table>

**Goal Date**

**Student's Name:**

**Completion Date**

**Mastery Met (Teacher's Initials)**
## The Self-Advocacy Strategy Management Chart

<table>
<thead>
<tr>
<th>STUDENT NAMES</th>
<th>Education Conferences</th>
<th>Transition Conferences</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Stage 1: Orient and Make Commitments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Stage 2: Describe</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Stage 3A: Model &amp; Practice (Education)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Stage 3B: Model &amp; Prepare (Transition)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Stage 4: Verbal Practice</td>
<td>Group Practice &amp; Feedback</td>
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<tr>
<td></td>
<td>Stage 5: Individual Practice &amp; Feedback</td>
<td>Generalization Part I</td>
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<tr>
<td></td>
<td>Stage 6: Generalization Part II</td>
<td>Generalization Part III</td>
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<tr>
<td></td>
<td>Stage 7: Generalization Part III</td>
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</table>
The "SHARE" Behaviors

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
   - Don't look uptight
   - Tell yourself to stay calm
E - Engage in eye communication
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
I PLAN

Step 1: Inventory your
- strengths
- areas to improve or learn
- goals
- choices for learning or accommodations

- When: Before the conference
- How: 1. Think about the inventory areas.
   2. Complete a worksheet.
   3. Make your Inventory.
## The Self-Advocacy Strategy

Student Name: ____________________________

Date: __________ Updates: ________________

### EDUCATION INVENTORY

1. **Strengths**
   - **Reading Skills:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Writing Skills:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Math Skills:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Study Skills:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Classroom Behavior Skills:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Social Skills:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Computer/Technology Skills**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Career & Employment Skills:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________

2. **Areas to Improve or Learn**
   - __________________________________
   - __________________________________
   - __________________________________
   - __________________________________

3. **Goals**
   - **School Goals:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Academic Goals:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Classroom Behavior and Social Goals:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Career/Employment Goals:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Extracurricular Goals:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________
   - **Future Goals:**
     - __________________________________
     - __________________________________
     - __________________________________
     - __________________________________

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### EDUCATION INVENTORY (CONT.)

4. Choices for Learning

<table>
<thead>
<tr>
<th>Helpful Activities:</th>
<th>Helpful Materials:</th>
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<tr>
<th>Learning Preferences:</th>
<th>Testing Preferences:</th>
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</table>

### MY PERSONAL INVENTORY

- **Student Name:**

- **Date:**

- **Updates:**

- **Reading Skills I Know:**

- **Reading Skills I Need to Know:**

- **Reading Goals:**

- **Math Skills I Know:**

- **Math Skills I Need to Know:**

- **Math Goals:**

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# MY PERSONAL INVENTORY (CONT.)

<table>
<thead>
<tr>
<th>Writing Skills I Know:</th>
<th>Writing Skills I Need to Know:</th>
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Writing Goals:

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<tr>
<th>Study Skills I Know:</th>
<th>Study Skills I Need to Know:</th>
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Study Goals:

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# MY PERSONAL INVENTORY (CONT.)

<table>
<thead>
<tr>
<th>Classroom Behavior &amp; Social Skills I Know:</th>
<th>Classroom Behavior &amp; Social Skills I Need to Know:</th>
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Classroom Behavior & Social Skills Goals:

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<tr>
<th>Computer Skills I Know:</th>
<th>Computer Skills I Need to Know:</th>
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Computer Skills Goals:

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Computer Skills Goals:

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Groups I Learn Best in Are:

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### MY PERSONAL INVENTORY (CONT.)

**Materials That Help Me Learn Best Are:**

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**Tests I Do the Best on Are:**

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**Things I Do Best on Are:**

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**My Hobbies are:**

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**My Career Goals are:**

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### THE SELF-ADVOCACY STRATEGY

**TRANSITION INVENTORY**

<table>
<thead>
<tr>
<th>Student Name:</th>
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<tbody>
<tr>
<td>Date:</td>
<td>Updates:</td>
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</table>

#### Strengths

<table>
<thead>
<tr>
<th>Independent Living Skills:</th>
<th>Career &amp; Employment Skills:</th>
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#### Financial & Consumer Skills:

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#### Social & Family-Living Skills:

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#### Citizenship & Legal Skills:

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#### Health & Wellness Skills:

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#### Community Resource Skills:

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#### Leisure & Recreation Skills:

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### TRANSITION INVENTORY (CONTINUED)

<table>
<thead>
<tr>
<th>GOALS</th>
<th>SKILLS NEEDED FOR SUCCESS</th>
<th>SKILLS TO IMPROVE OR LEARN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living</td>
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<tr>
<td>Career &amp; Employment</td>
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<tr>
<td>Financial &amp; Consumer</td>
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<tr>
<td>Social &amp; Family Living</td>
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</tbody>
</table>

### TRANSITION INVENTORY (CONT.)

<table>
<thead>
<tr>
<th>GOALS</th>
<th>SKILLS NEEDED FOR SUCCESS</th>
<th>SKILLS TO IMPROVE OR LEARN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citizenship &amp; Legal</td>
<td></td>
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</tr>
<tr>
<td>Health &amp; Wellness</td>
<td></td>
<td></td>
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<tr>
<td>Community Involvement</td>
<td></td>
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</tr>
<tr>
<td>Leisure &amp; Recreation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TRANSITION INVENTORY (CONTINUED)

FURTHER EDUCATION OR TRAINING

ACCOMMODATIONS

POTENTIAL RESOURCES

AGE-OF-MAJORITY RIGHTS
I PLAN

Step 2: Provide your inventory information

- **When:** The discussion centers on your
  - strengths
  - areas to improve or learn
  - goals
  - choices for learning or accommodations

- **How:**
  1. Use the "SHARE" Behaviors.
  2. Use your Inventory.
  3. Make complete statements.
I P L A N

Step 3: Listen and respond

- When:

Listen when:
- someone is making a statement
- someone is asking a question

Respond when:
- someone asks you a question
- you have information to add
I PLAN

Step 3: Listen and respond

- How:

  1. Be an active listener.
     - Use head nods
     - Paraphrase to yourself
     - Ask yourself questions

  2. Use the "SHARE" Behaviors.

  3. Use your Inventory.

  4. Use positive statements.

  5. Negotiate agreement.
Step 4: **Ask questions**

- **When:** You need information. You don't understand what people are saying.
Step 4: **Ask questions**

**How:**
1. Use the "SHARE" Behaviors.
3. Ask **complete questions.**
4. Ask **one question** at a time.
I PLAN

Step 5: Name your goals

- When: Near the end of the conference.

- How: 1. Use the "SHARE" Behaviors.
  2. For each goal tell:
     - What you want to do.
     - When you want to complete it.
The Self-Advocacy Strategy
Stage 3: Model And Prepare
for Education and/or Transition Planning Conference

Lesson 1  Do:  Complete Inventory
Strengths and Areas to Improve or Learn
Complete Worksheet

Need:  Inventory
       Skill Lists
       Worksheet

Lesson 2  Do:  Teacher models "PLAN" and "SHARE"

Need:  Model Cards

Lesson 3  Do:  Complete the Inventory

Need:  Inventory
       Skill Lists
       Worksheet

Developed by Ann Hoffman, Cedar Rapids, Iowa, and Conn Thomas, Amarillo, Texas

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The Self-Advocacy Strategy

Name: __________________________
Date: __________________________

EDUCATION WORKSHEET

<table>
<thead>
<tr>
<th>Classes</th>
<th>Skills Needed for Success</th>
<th>Skills to Improve or Learn</th>
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</table>
Situation #1

You are the school psychologist.

Say: "Okay. We are meeting today to discuss your goals for next year, but before we do that, let's talk about your strengths. What is your biggest strength in school?"
Situation #2

You are the school counselor.

Say: "What skills do you use when you're reading?"
You are a parent.

Say: "I'm concerned about how ________is doing in school. I don't think ______________ knows how to study for tests."

Listen to the response and then say: "You don't know how to study for history tests where there are a lot of little facts to remember."
Situation #4

You are the school principal.

Say: "What is your study routine?"

Listen to the response and then say: "What I mean is, how do you study for a test? What's the first thing you do, the second thing you do, and so forth?"
Situation #5  Student's Name:________________________

You are a parent.

Say:  "I want ______to go to college, but ___________ doesn't seem to have any interest in it."

Get Ready for College

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Situation #6

You are a teacher.

Say: "Well, that just about wraps it up."
Situation #1

Student's Name: ____________________

You are the school psychologist.

Say: "Thank you for being here. We are meeting today to discuss your goals, plans, and needs in moving from school to adult life. But before we do that, let's talk about your strengths. What skills have you developed to prepare you for life as an adult?"
Situation #2

You are the school counselor.

Say: "If you have personal, family, alcohol, or drug problems, what do you do or where would you go for help?"
Situation #3

You are a parent.

Say:  "I'm concerned that ______________ doesn't seem to know how to deal with money. I just don't know how he/she is going to make it on his/her own."

Listen to the response and then say: "You don't save or budget your money. How do you expect to live like that?"
Situation #4

Student's Name: ______________

You are the vocational evaluator.

Say: "What employment or vocational skills do you have?"

Listen to the response and then say: "What I mean is, what skills do you have for getting and keeping a job?"
Choices for Learning

Helpful Activities:

1. The activities I learn best from are:
   a. reading
   b. listening
   c. taking notes
   d. watching
   e. discussing
   f. writing reports
   g. making oral reports
   h. working math problems
   i. working on lab projects
   j. working on shop projects
   k. completing study guides
   l. (other)
Choices for Learning (cont.)

Helpful Activities:

2. Materials or equipment that help me learn are:

   a. flash cards
   b. dictionary
   c. calculator
   d. computer
   e. games
   f. tape recorder
   g. films/videos
   h. typewriter
   i. charts
   j. shop tools
   k. (other)____________________

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Choices for Learning (cont.)

Learning Preferences:

1. I learn best when I work:
   
   a. by myself
   b. by myself with a teacher
   c. with a tutor
   d. with another student
   e. (other) ____________
Learning Preferences:

2. I learn best in the following groups:

   a. large groups for lectures
   b. medium groups (3-6 people)
   c. small groups (2-3 people)
   d. on my own
   e. with one other person
   f. other

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Choices for Learning (cont.)

Learning Preferences:

3. When taking tests, I do best on:
   a. multiple-choice, true-false, or matching tests
   b. short-answer or essay tests
   c. open-note or open-book tests
   d. take-home test
   e. when I answer out loud
   f. (other) __________
# The Self-Advocacy Strategy

## Verbal Practice Checklist

### Student's Name: ______________________

<table>
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<tr>
<th>Attempts</th>
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### Naming Strategy Steps

- Inventory
  - Provide inventory information
  - Listen and respond
  - Ask questions
  - Name your goals

<table>
<thead>
<tr>
<th>Naming &quot;SHARE&quot; Behaviors</th>
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- Sit up straight
- Have a pleasant tone of voice
- Activate your thinking
- Relax
- Engage in eye communication

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<th>Total</th>
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### Answering Questions

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What Happens at an Education Planning Conference?

Conference Beginning

- Introductions are made.
- The conference purpose is explained.
- Legal rights are explained.
What Happens at an Education Planning Conference? (cont.)

Discussion of Learning Progress

- Your school progress, including progress toward graduation, is reviewed.
- Your test performance is described.
- The meaning of test results is explained.
- Your strengths and areas to improve or learn are discussed.
- Your questions are answered.
- Your ideas are considered.
What Happens at an Education Planning Conference? (cont.)

Discussion of Goals

- Education goals are suggested.
- Agreement is reached.
- Goal statements are written.
What Happens at an Education Planning Conference? (cont.)

Discussion of Services

- Available options and classroom placements are described and discussed.
- Opinions are considered.
- Service statements are written.
What Happens at an Education Planning Conference? (cont.)

Conference Conclusion

- Your education plan is summarized.
- Responsibilities are specified.
- A review date is set.
What Happens at a Transition Planning Conference?

Conference Beginning

- Introductions are made.
- The conference purpose is explained.
- Legal rights are explained.
What Happens at a Transition Planning Conference? (cont.)

Discussion of Transition Progress

- Your progress toward graduation is reviewed.
- Your performance is described.
- Your transition needs are discussed.
- Your transition strengths and areas to improve or learn are discussed.
- Your questions are answered.
- Your ideas are considered.
What Happens at a Transition Planning Conference? (cont.)

Discussion of Goals

- Transition goals are suggested.
- Agreement is reached.
- Goal statements are written.
What Happens at a Transition Planning Conference? (cont.)

Discussion of Resources, Services, and Accommodations

- Available resources and services are identified.
- Needed accommodations are specified.
- Transition service statements are written.
What Happens at a Transition Planning Conference? (cont.)

Conference Conclusion

- Your transition plan is summarized.
- Responsibilities are specified.
- A review date is set.
Basic Civil Rights for Individuals with Disabilities

Basic Rights:

1. The right to services
2. The right not to be subjected to discrimination
3. The right to an individual education and transition program
4. The right to be served in the least restrictive environment
5. The right to procedural due process
6. The right to parent participation
Basic Civil Rights for Individuals with Disabilities (cont.)

Sources of Legal Rights:

- U.S. Constitution
- Civil Rights Act of 1964
- Individuals with Disabilities Education Act (IDEA)
- Section 504 of the Vocational Rehabilitation Act
- Americans with Disabilities Act (ADA)
- Family Educational Rights and Privacy Act (FERPA).
Age of Majority

The age at which a person is granted by law all the rights and responsibilities of an adult.

In most states, this is age 18.

Age of Majority = Legal Age
Age-of-Majority Rights & Responsibilities

- Seeking employment or additional education
- Voting in public elections (citizenship required)
- Entering into binding contracts
- Owning land and other property
- Making a valid will
- Registering for Selective Service (males)
- Entering the armed service
- Consenting to marriage
- Consenting to education programs & services
- Having personal freedom to make specific choices about how to live one’s life
Legal Emancipation

The circumstances under which a person becomes free of parents’/guardians’ care, responsibility, and control.
**SIMULATED EDUCATION CONFERENCE GUIDE**

**PART I:**
"At the conference today, we have the following people present: you, your parents, the school psychologist, your teacher, the principal, the vocational teacher, and your counselor. The purpose of our meeting today is to discuss your progress and to make plans for your future education. Let’s start with your educational progress and strengths, and then discuss the areas or skills you want to improve or learn."

<table>
<thead>
<tr>
<th>Assigned Student</th>
<th>Teacher Speaking</th>
<th>Statement/Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher</td>
<td>1. &quot;(Student’s name), you seem to have trouble in courses where you need to take notes. How do you feel about your note-taking skills?&quot;</td>
<td></td>
</tr>
<tr>
<td>Principal</td>
<td>2. &quot;(Student’s name), what learning strengths or skills do you think you have?&quot;</td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>3. &quot;(Student’s name), what do you see as areas you want to improve?&quot;</td>
<td></td>
</tr>
<tr>
<td>Parent</td>
<td>4. &quot;I’m concerned because (Student’s name) rarely does homework at home. I think he/she should do homework.&quot;</td>
<td></td>
</tr>
<tr>
<td>Psychologist</td>
<td>5. &quot;(Student’s name), how do you feel about learning and school?&quot;</td>
<td></td>
</tr>
<tr>
<td>Counselor</td>
<td>6. &quot;(Student’s name), how well can you translate abstract curriculum materials to concrete, visual representations?&quot; (A)</td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>7. &quot;(Student’s name), your math scores show you may have some problems in that area. Could you talk about what areas of math are your strongest?&quot;</td>
<td></td>
</tr>
<tr>
<td>Counselor</td>
<td>8. &quot;(Student’s name), your WISC-III scores show you have above-average ability.&quot; (A)</td>
<td></td>
</tr>
<tr>
<td>Psychologist</td>
<td>9. &quot;(Student’s name), your writing scores show you may have problems in that area. What parts of writing give you the most problems?&quot;</td>
<td></td>
</tr>
<tr>
<td>Principal</td>
<td>10. &quot;(Student’s name), your performance score is higher that your verbal score on the WISC-III. This represents a major discrepancy.&quot; (A)</td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>11. &quot;I’ve heard form several teachers that (Student’s name) rarely finishes assignments.&quot;</td>
<td></td>
</tr>
<tr>
<td>Counselor</td>
<td>12. &quot;(Student’s name), doesn’t seem to know how to read a textbook. Also, he/she doesn’t know how to check if he/she understands what he/she has read. (Student’s name), do you want to work on these skills?&quot;</td>
<td></td>
</tr>
<tr>
<td>Psychologist</td>
<td>13. &quot;(Student’s name), in looking at your school work and talking with your teachers, it seems to me that you really need to manage your time better. Is this an area you want to improve?&quot;</td>
<td></td>
</tr>
<tr>
<td>Principal</td>
<td>14. &quot;(Student’s name), what are your strengths in the area of social and interpersonal skills?&quot;</td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>15. &quot;(Student’s name), has never had a good year in school. His/her best grade has been a ‘C’.&quot;</td>
<td></td>
</tr>
</tbody>
</table>

*Item marked with an (A) require a question.*
*Items marked with an (N) require the student to name at least one goal.*
**SIMULATED EDUCATION CONFERENCE GUIDE (CONT.)**

**PART II:** "Now let's discuss your goals."

<table>
<thead>
<tr>
<th>Assigned Student</th>
<th>Teacher Speaking</th>
<th>Statement/Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counselor</td>
<td>16. <em>(Student's name), I understand you have some difficulty working in groups.</em></td>
<td></td>
</tr>
<tr>
<td>Parent</td>
<td>17. <em>(Student's name), doesn't do well on tests. He/she doesn't know how to study for them.</em></td>
<td></td>
</tr>
<tr>
<td>Vocational Teacher</td>
<td>18. <em>(Student's name), what vocational or career skills do you want to work on this year?</em> (N)</td>
<td></td>
</tr>
<tr>
<td>Psychologist</td>
<td>19. <em>(Student's name), what skills do you have that would allow you to do well in college?</em></td>
<td></td>
</tr>
<tr>
<td>Parent</td>
<td>20. <em>I'm worried about (Student's name). He/she really doesn't have any goals for his/her future.</em> (N)</td>
<td></td>
</tr>
<tr>
<td>Vocational Teacher</td>
<td>21. <em>(Student's name), are there any special courses or training that you want?</em> (N)</td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>22. <em>(Student's name), what goals have you set for yourself for improving your classroom behavior?</em> (N)</td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>23. <em>More and more students use computers to complete school assignments and access information. (Student's name), what computer or technology skills can you use and what skills do you want to learn?</em> (N)</td>
<td></td>
</tr>
<tr>
<td>Counselor</td>
<td>24. <em>(Student's name), what kind of job or career training are you interested in after you finish school?</em> (N)</td>
<td></td>
</tr>
</tbody>
</table>

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**PART III:** "Now let's talk about the services you'll receive."

<table>
<thead>
<tr>
<th>Assigned Student</th>
<th>Teacher Speaking</th>
<th>Statement/Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counselor</td>
<td>25. <em>Let's see, from our discussion and from (Student's name) test scores, I think our major goals are in the areas of reading, writing, and math. I also think (Student's name) needs to start looking at future careers or training, so that is also a goal I'm recommending.</em> (N)</td>
<td></td>
</tr>
<tr>
<td>Parent</td>
<td>26. <em>I want (Student's name) to go to college.</em></td>
<td></td>
</tr>
<tr>
<td>Counselor</td>
<td>27. <em>(Student's name), what social skills do you want to work on next year?</em></td>
<td></td>
</tr>
<tr>
<td>Counselor</td>
<td>28. <em>(Student's name), are there any special activities that teachers have used to help you with your schoolwork?</em></td>
<td></td>
</tr>
<tr>
<td>Principal</td>
<td>29. <em>(Student's name), will you tell us how you think you learn best or do best in school?</em></td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>30. <em>(Student's name), are there particular materials or equipment that help you learn?</em></td>
<td></td>
</tr>
<tr>
<td>Counselor</td>
<td>31. <em>(Student's name), in what kind of groupings do you learn best?</em></td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>32. <em>I think (Student's name), does best on essay tests.</em></td>
<td></td>
</tr>
</tbody>
</table>

---

*Items marked with an (N) require the student to name at least one goal.*
**SIMULATED EDUCATION CONFERENCE GUIDE (CONT.)**

**PART IV:**
"Okay, it's time to close the conference."

<table>
<thead>
<tr>
<th>Assigned Student</th>
<th>Teacher Speaking</th>
<th>Statement/Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher</td>
<td>33. &quot;Thank you all for coming to this conference.&quot; (N)*</td>
<td></td>
</tr>
<tr>
<td>Principal</td>
<td>34. &quot;(Student's name), is it clear to you what you'll be working on next year?&quot; (N)</td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>35. &quot;Well, that does it. It looks like (Student's name), will be working on reading and math goals next year.&quot; (N)</td>
<td></td>
</tr>
<tr>
<td>Counselor</td>
<td>36. &quot;Your goals for next year are to improve your writing and social skills -- right?&quot; (N)</td>
<td></td>
</tr>
</tbody>
</table>

* Items marked with an (N) require the student to name at least one goal.

---

**SIMULATED TRANSITION CONFERENCE GUIDE**

**PART I:**
"At the conference today, we have the following people present: you, your parents, the school psychologist, nurse, principal, the vocational teacher, your counselor, and a few of your teachers. The purpose of our meeting today is to discuss your progress and plans in making the change from being a student to assuming the rights and responsibilities of an adult. Let's start with your transition progress, including your skills or strengths, and then we'll discuss the areas or skills that you want to improve or learn."

<table>
<thead>
<tr>
<th>Assigned Student</th>
<th>Person Speaking</th>
<th>Statement/Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal</td>
<td>1. &quot;(Student's name), what strengths or skills do you think you have that will help you meet the demands of life after high school (or to be successful in college)?&quot;</td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td>2. &quot;(Student's name), what do you plan to do after you complete high school?&quot;</td>
<td></td>
</tr>
<tr>
<td>Math Teacher</td>
<td>3. &quot;(Student's name), you seem to have trouble in consumer math class. What do you know about handling financial matters?&quot; (A)</td>
<td></td>
</tr>
<tr>
<td>Parent</td>
<td>4. &quot;I'm concerned because (Student's name) rarely does his/her chores or prepares meals at home. How will he/she take care of him/her-self?&quot;</td>
<td></td>
</tr>
<tr>
<td>Psychologist</td>
<td>5. &quot;(Student's name), what independent or daily living skills have you developed?&quot;</td>
<td></td>
</tr>
<tr>
<td>Counselor</td>
<td>6. &quot;(Student's name), what career-related competencies or proficiencies do you think you have developed?&quot; (A)</td>
<td></td>
</tr>
</tbody>
</table>

* Item marked with an (A) require a question.
SIMULATED TRANSITION CONFERENCE GUIDE (CONT.)

Assigned Student   Person Speaking

Vocational Evaluator  7. "Your performance on the Bennett Mechanical Comprehension test (or the BMCT) shows you have good knowledge of physical forces and mechanical elements." (A)

Counselor  8. "(Student's name), what occupational or employment possibilities have you explored?"

Psychologist  9. "(Student's name), your practical knowledge scores in personal and social areas is average, but below average in the occupational areas." (A)

Parent  10. "(Student's name), where do you plan to live?"

Nurse  11. "(Student's name), what do you know about preventing and treating common illnesses?"

Counselor  12. "(Student's name), how do you plan to get around the community?" (A)

Parent  13. "(Student's name) doesn't seem to have many friends."

Principal  14. "(Student's name) in looking at your school reports and in talking with your teachers and parent(s), it seems to me that you really need to organize and manage your time better. Is this an area you want to improve?"

Counselor  15. "(Student's name), what resources or services that are available in our community are you familiar with?"

Counselor  16. "(Student's name), when you are not at school or work, what kind of things do you like to do?"

Parent  17. "(Student's name) wants to get a car, but I don't think he/she knows about all the costs and responsibilities."

PART II: "Now let's discuss your goals."

Vocational Evaluator  18. "(Student's name), what are your future education or training goals?"

Teacher  19. "(Student's name), are there any special courses or training that you want?"

Parent  20. "I want (Student's name) to go to college." (N)

Counselor  21. "(Student's name), are there any leisure or recreational activities you want to become involved with or learn?" (N)

Principal  22. "(Student's name), what are your plans for being involved in the community?" (N)

Parent  23. "(Student's name) is going to be 18 soon, and I'm concerned that he/she doesn't understand the responsibilities of being an adult." (N)

Social Worker  24. "(Student's name), what transition goals do you want to work on?" (N)

* Items marked with an (A) require a question.
* Items marked with an (N) require the student to name at least one goal.
SIMULATED TRANSITION CONFERENCE GUIDE (CONT.)

**PART III:**
"Now let's talk about services or agencies you will need to contact."

<table>
<thead>
<tr>
<th>Assigned Student</th>
<th>Person Speaking</th>
<th>Statement/Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher</td>
<td>Nurse</td>
<td>&quot;(Student's name), what medical and/or dental services will you require when you live on your own?&quot; (N)*</td>
</tr>
<tr>
<td>Counselor</td>
<td>Principal</td>
<td>&quot;(Student's name), what people or agencies would you contact if you have any legal problems?&quot; (N)*</td>
</tr>
<tr>
<td>Nurse</td>
<td>Principal</td>
<td>&quot;(Student's name), what independent living skills do you want to improve?&quot; (N)*</td>
</tr>
<tr>
<td>Teacher</td>
<td>Principal</td>
<td>&quot;(Student's name), as an adult citizen, you will have certain civic responsibilities. Would you please describe some of those responsibilities to us?&quot; (A or N)</td>
</tr>
<tr>
<td>Parent</td>
<td>Parent</td>
<td>&quot;I still think (Student's name), needs to learn how to budget and save money!&quot; (N or A)*</td>
</tr>
<tr>
<td>Principal</td>
<td>Parent</td>
<td>&quot;Okay, it's time to close the conference.&quot;</td>
</tr>
<tr>
<td>Counselor</td>
<td>Parent</td>
<td>&quot;Your transition goals are to improve you social and interpersonal skills, learn your civic responsibilities, and get a job, right?&quot; (N)*</td>
</tr>
<tr>
<td>Parent</td>
<td>Parent</td>
<td>&quot;I think (Student's name), is really excited about living on his/her own. But I'm not sure that he/she even knows about setting up and paying for utility services.&quot; (N)</td>
</tr>
</tbody>
</table>

* Item marked with an (A) require a question.
* Items marked with an (N) require the student to name at least one goal.
THE SELF-ADVOCACY OR "I PLAN" STRATEGY
GROUP PRACTICE SCORE SHEET

RESPONSE #1
SHARE
PL (R) AN

RESPONSE #2
SHARE
PL (R) AN

RESPONSE #3
SHARE
PL (R) AN

RESPONSE #4
SHARE
PL (R) AN

RESPONSE #5
SHARE
PL (R) AN

RESPONSE #6
SHARE
PL (R) AN

RESPONSE #7
SHARE
PL (R) AN

RESPONSE #8
SHARE
PL (R) AN

RESPONSE #9
SHARE
PL (R) AN

RESPONSE #10
SHARE
PL (R) AN

Points Earned
SHARE
PL (R) AN

Total Responses
SHARE
PL (R) AN

EDUCATION CONFERENCE
INDIVIDUAL MASTERY CHECKLIST

1. "What do you think are your strongest learning skills?"
   
   Named at least 3 strengths under each area
   (reading, math, writing, study).

2. "What do you think are your strongest social or interpersonal skills?"
   
   Named at least 3 social skills strengths.

3. "What are your strongest employment or vocational skills?"
   
   Named at least 3 vocational strengths.

4. "Your test results and grades indicate that you have difficulty in
   (appropriate skill area)"

Student Name:

Date:

University of Kansas Center for Research on Learning 2006
5. "Your performance on the psychometric testing we did shows that you have significant dysfunction's in information processing." (A)*

6. "What are some other areas in which you're having difficulty?"

7. "I've reviewed your WISC-III scores, and it's very clear that your Perceptual Organization Score is significantly lower than your Freedom for Distractibility Score." (A)

8. "What goals do you want to work on next year that will help you do better in school?"

9. "Are there any after school activities which you want to continue or begin?"

10. "I'm concerned about your [relevant behavior]."

* The item marked with an (A) requires the student to ask a question.

11. "What size learning or study group works best for you?"

12. "What kinds of materials have you found useful for learning in school or at home?"

13. "On what kinds of test questions do you do best?"

14. "I feel you have really improved your [relevant skills] this year."

15. "Have we forgotten anything you want to mention?"

16. "Well, I guess we've about covered everything."

Summarized all goals.
TRANSITION CONFERENCE
INDIVIDUAL MASTERY CHECKLIST

1. "What do you think are your strongest independent living skills?"
   
   |   |   |   |   |   |
   | SHARE | P L (R) | AN |
   
   Named at least 3 independent living skill strengths.

2. "What are your strongest employment or vocational skills?"
   
   |   |   |   |   |   |
   | SHARE | P L (R) | AN |
   
   Named at least 3 employment/vocational strengths.

3. "What are your strongest financial skills?"
   
   |   |   |   |   |   |
   | SHARE | P L (R) | AN |
   
   Named at least 3 financial skill strengths.

4. "What are your strongest social and interpersonal skills?"
   
   |   |   |   |   |   |
   | SHARE | P L (R) | AN |
   
   Named at least 3 social and interpersonal skill strengths.

5. "What are your strengths with regard to locating and using community resources?"
   
   |   |   |   |   |   |
   | SHARE | P L (R) | AN |
   
   Named at least 3 community resource skill strengths.

6. "What are your strengths in maintaining your medical and dental needs?"
   
   |   |   |   |   |   |
   | SHARE | P L (R) | AN |
   
   Named at least 3 medical and dental strengths.

7. "Your performance on the Revised Minnesota Paper Form Board Test shows that while you have strong spatial perception skills your mechanical aptitude is discrepant."
   
   (A)*

   |   |   |   |   |   |
   | SHARE | P L (R) | AN |
   
   "Your test results and reports form your teachers and parent(s) indicate you have difficulty in"
   
   (appropriate transition area)

   |   |   |   |   |   |
   | SHARE | P L (R) | AN |

8. "What are some other areas that you want to improve?"
   
   |   |   |   |   |   |
   | SHARE | P L (R) | AN |

* The item marked with an (A) requires the student to ask a question.
10. "What travel and transportation skills do you want to learn or improve?"

11. "What are your future education or training goals?"

12. "What do you like to do for leisure and recreation?"

13. "I feel you've really improved in your [relevant transition skill] this year."

14. "I am concerned however about your [relevant transition skill or knowledge]."

15. "Have we forgotten anything you want to mention?"

16. "Thank you, I think we've just about covered everything."

Summarized all transition goals.
REPORT OF STUDENT-INITIATED STRATEGY USE FORM

Your name: __________________________________________

Date/place/time of meeting: __________________________________________

__________________________________________

Purpose of meeting: __________________________________________

Persons involved: __________________________________________

__________________________________________

Results of the meeting or action taken: __________________________________________

__________________________________________

How satisfied are you with the results of this meeting or the action taken as a result of this meeting? Please circle the number that best describes your feelings.

Not satisfied Somewhat satisfied Very satisfied
1 2 3

Learning 2006