CHAPTER 3
The Planning Process

Introduction
Effective teachers know that planning begins the moment you meet and start to work with a student. It starts informally as you welcome, listen, and help a new learner feel comfortable. As you observe—using a checklist, notes, or another method—you are already considering what this student may want and need.

As is stressed in Bridges to Practice, we need to put a more deliberate emphasis on this stage of service to adult learners. Why? With adults, it simply won’t do to plan for. The adult learner herself is a critical player. Planning for must be replaced with planning with. When adults aren’t invited to participate in decisions about learning, they sometimes leave. If they stay, they may improve basic skills, but they aren’t likely to gain self-advocacy, a crucial ingredient of success for anyone, particularly those with a learning disability.

This chapter is based on the planning processes outlined in Bridges to Practice: Guidebook 3. First we will read about the approach of Glenda Turner, a teacher in the action research group, as she shares the way she used her keen observation of students to prepare to develop a plan. Then we will look at curricular options that a teacher and learner might consider, and we will think about how to go about planning together. We’ll examine the key role of self-advocacy and hear personal accounts from Rebekah White-Williams and Joe Spoon. Finally, we’ll consider some tools from Equipped for the Future, an adult education framework developed by the National Institute for Literacy that may be used in developing the instructional plan.

Preparing to Develop an Instructional Plan
The information gathered in the assessment process (described in Chapter 2) is used at this point to prepare for an instructional plan. The practitioner should be familiar with the learner’s assessment profile in order to make good decisions about a curriculum.
Glenda Turner’s Experience:
Using Observation to Plan With Students

Anita

Anita is a 35-year-old female. She enrolled in my Families First class January 18, 2001. I noticed unusual AMES level 7D scores. They were reading 12.9+, math k.0, and language 9.7. She completed all the entrance forms that day, and we spent some time talking. I always spend as much time as possible with new students to get to know them better, to answer questions, and to help relieve anxiety.

On the screening checklist, I made notes of pertinent aspects of Anita’s background. At age 12, she moved to East Tennessee. She does not remember doing much math in class. Even though she made Fs in math, her other grades helped her to pass. She moved with her family back to California when she was in the ninth grade. When Anita was 15, she lied about her age and went to work in a fast-food restaurant. The people she worked with helped her learn how to count change. She later worked at casinos at Lake Tahoe. Counting large amounts of money was very difficult for her. She would go to a quiet place and count the money several times.

Several people in her family struggle with learning, for a variety of reasons. Anita’s father is illiterate, but successful. Her brother has experienced learning problems. She has three children; her oldest child is in high school and has been certified learning disabled, her 9-year-old attends Tennessee School for the Deaf due to serious hearing problems, and her 4-year-old is exhibiting ADHD characteristics.

Anita told me she didn’t even try on the math because she had always had problems in school. I gave her books I thought would be appropriate. After watching her for several days, I was sure I needed to make adjustments in her program. She was not staying on task, and she was accomplishing very little.

I suggested that Anita meet with me after class so we could discuss her program. She seemed very willing to do what was necessary to help herself. She went through “Analyzing My Learning,” marking a number of things that were significant:

• Health/medical – too much energy and not enough energy, anxiety
• Math – copying numbers, working in columns, steps in problems, con-
fusion of left and right. (Glenda had noted these items, as well.)

- Other (Behaviors/Psychological Manifestations) – difficulty organizing her time. (Here, Glenda had also observed a significant number of additional items, including difficulty concentrating, easily distracted, difficulty sitting still, displaying off-task behavior, lack of productivity, impatient, impulsive.)

I talked with Anita about her problems of staying on task and her inability to complete much work during the 4 hours she was in my class. Anita agreed that it would be helpful if she could be tested through the Department of Human Services’ Family Services Counseling. Together, we completed the necessary paperwork for that process. I explained that it was very important that she try to understand herself and be involved in making these decisions.

Then we started to try out some strategies and initiate a change in her study environment. Anita moved to an area of the room where she would have fewer distractions, helping to locate the area for her own desk. I then purchased the following items to help her better organize her study materials: notebook, dividers, zippered pouch, pencils, highlighters, and acetate overlays. We talked about the best color of highlighter for her and the effect of different colored overlays to place over her reading materials. Anita made her own calendar on the computer. I encouraged her to write down assignments and school-related events. Anita felt very good about what we had done.

Anita could not handle long assignments. Again, we tried different strategies to see if they helped. She did much better when given one social studies unit at a time. We decided I would enlarge math assignments and cut them apart into half-page sizes. We started on subtraction. Success! She advanced to division and then to multiplication after I found a tutor to work with her one day a week. I wanted her to have the advantage of the one-on-one help I could not provide. She told me no one had ever taken the time to talk about her difficulties with learning. Anita expressed a desire to try some of my suggestions with her own children.

Postscript: Anita had a number of family problems. When she entered Family Services Counseling, Glenda did not see her again. She does not know if she was ever tested for learning disabilities.
Robin
I decided to try the same method with another student in my class who was disorganized, often frustrated, and not completing very much work. Robin was tested January 3, 2001. Her AMES scores were reading 9.9, math 4.7, and language 4.7.

When doing the observation checklists, Robin and I had checked very similar items:
• Math – difficulty with facts and procedures
• Other (Behaviors/Psychological Manifestations) – Almost every item under attention, organization, and social.

We tried some strategies similar to those that had helped Anita. Robin moved to her own special chosen part of the room. Help was given with organization of materials, especially her notebook. Robin and I decided she would only work on reading and math. She began to see improvement. I began to see improvement, not only in her work, but also in her feelings about herself and her ability!

Robin was retested March 30, 2001. Her score in reading was 12.9 and 12.5 in math. Robin is now working to improve her language score. She also knows she must keep reviewing to maintain that good math score.

Postscript: Robin left the class to work at a nursing home.

Determining a Curriculum
Learners may have learning needs in any of five curricular areas:
• Basic skills
• Critical content
• Learning Strategies
• Social skills
• Self-advocacy

Choices About Learning: Curricular Areas
As you plan together with your student, consider the priorities for this particular person. What does she most need to learn? Bridges to Practice suggests five curricular options from which to choose in working with a person who may have learning disabilities: basic skills, learning strategies, critical content, social skills, and self-advocacy. An adult learner may
need to work on one or several of these options at once, but she may never have thought about her priorities. The teacher will need to find a way to present and explain them as possible areas on which she might choose to work. Later in this chapter you will find tools suited for this purpose.

Most adults coming to adult education will choose to improve some of their basic skills, and many will have decided to work toward a GED and/or some other credential that will require learning specific critical content. As you observe and work with your student, you will likely be the one to recognize the need for one or more of the other three. She may comment that she just cannot seem to remember what she reads or the steps in some procedure, but she probably isn’t aware that learning strategies would be of help to her. She may know that she “just doesn’t seem to get along with other people,” but she may not translate that to a need for better social skills. She may say that she “just lets people run all over her” or that she doesn’t want anybody to know she can’t read well, but the term self-advocacy may be new to her.

The questions below are helpful in working with a learner to determine educational priorities:

- **Basic skills**: Does she need to acquire basic skills for acquiring and expressing information (e.g., reading, spelling, reading comprehension, math)?
- **Critical content**: Does she need to learn critical content necessary for daily interactions and responsibilities (e.g., for GED, driver’s license, test for any particular job)?
- **Learning strategies**: Does she need to acquire learning strategies for completing tasks efficiently and effectively (e.g., memory strategies, study strategies)?
- **Social skills**: Does she need to learn social skills for interacting successfully with others (e.g., listening skills, effective body language)?
- **Self-advocacy**: Does she need to learn self-advocacy strategies for communicating her interests, needs, and rights (e.g., being assertive rather than passive or aggressive, practicing a job interview in which she puts forward abilities as well as disclosing a disability)?

### The Role of Self-Advocacy in Success

Self-advocacy is the one area from the five curricular areas with which teachers are often least familiar. However, it is essential for students with
learning disabilities to advocate for their needs both in the classroom and in other arenas.

Some people with learning disabilities do well in life; others barely cope. What factors make the difference? This is no idle question since we are talking about a person’s ability to be happy and productive.

Researchers Gerber, Ginsberg, and Reiff (1992), found the following conditions increase the likelihood of success:

- being informed that they have a disability,
- accepting the disability,
- developing approaches to education and employment that acknowledge the disability and do not attempt to avoid the problems,
- the desire to succeed,
- goal orientation, and
- reframing past learning disability experiences in more positive and productive manners.

These characteristics together paint a clear picture of self-advocacy.

**Personal Experiences With Self-Advocacy**

Teachers know a lot about raising self-esteem, but helping a student to develop the ability to speak out for herself goes several steps further. To support students in becoming advocates for themselves, we need to explicitly teach them

- to identify their strengths and weaknesses,
- to understand how they learn best and to figure out adaptations that help them succeed,
- to set goals and work out strategies for monitoring progress toward those goals, and
- to develop effective, assertive communication skills—and practice them.

Two of the teacher participants in the LD Action Research Project have written of their own experiences with disabilities and their own journey of self-advocacy.

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**What is self-advocacy?**

- It is the ability to fend for oneself.
- It is the ability to negotiate for oneself.
- It is the ability to understand one’s needs.
- It is the ability to ask for and get what one needs.
- It is the ability to access all the agencies and legal rights available (Destination Literacy, Learning Disabilities Association of Canada, 1999, p. 175)
Rebekah White-Williams: My Story of Struggle

When I started school, I was so excited. I couldn’t wait to learn my ABCs and numbers. I was thrilled at the possibility of reading like my big brothers. I thought that school would be the most wonderful thing in the world. But all that ended quite suddenly for me. I had such a hard time learning. For the rest of my school years, and even into the first 2 years of college, I would struggle with understanding what I read. I would find myself thinking I was not capable of learning.

It was because of my parents that I wanted to go to college. I had decided I would make something of myself and lick this problem. I had thought that I just wasn’t focused enough on my studies. I struggled through the first 2 years and was about ready to give up when I met this wonderful teacher. He understood my problem right away. His wife was certified in teaching LD students and could possibly help me. Upon meeting her, I felt as if a wonderful door had opened for me. I found that I wasn’t dumb and that I was able to learn. She showed me ways of learning and taught me about tools that could help me with my problem. All of a sudden, learning wasn’t a chore. It became a wonderful experience, and I wanted to learn more. I was hungry for learning and became eager to learn. Because of these people, I realized I was capable of learning. I learned that people with LD aren’t dumb, they just learn differently.

Joe Spoon: What Contributes to Success or Failure?

For the longest time I have been interested in learning disabilities. In my career as an educator, I have worked with many learning disabled individuals. The learning disabilities of these students ranged from very mild to the most severe types of LD. It has been my experience that there is a great deal of potential for success for those who have been diagnosed as learning disabled. I have often wondered just what unseen qualities an LD individual has that affects his or her success or failure in life. For an answer to this question, I often look inward and try to relate the success-and-failure experiences of my own life to my LD students.

First, let me explain my disability. I am legally blind. I have an inherited visual condition called “optic atrophy.” I have been told by doctors that my optic nerve never developed completely. Although my disability is more physical, I must deal with the limitations of partial vision each and every day. What factors played out in my life to allow me to achieve any
What factors played out in my life to allow me to achieve any success? I feel that learning about myself and learning what to do to help myself play an important role in my life.

My need to begin to do things for myself did not begin until I was ready to enter school. Up until that time, I can’t remember poor vision being much of an issue with my family or my friends. Mother and Dad must have known, but they were doing all sorts of minor accommodations to help me. For example, I remember now just how large the letters were that Mother would print for me to study and learn.

At school, I found myself in a situation totally foreign to me. The teacher handed out dittos, put assignments on the board, and asked the students to read from small print books. I was so frustrated and lost that I would often just sit in my seat and tremble. What could I do? My parents and the teacher decided that there was no immediate solution. I was taken out of the first grade. Before the next school year began my parents were contacted by a lady who would prove to be the catalyst for any success that I have had. Mrs. Joyce Bromley was contacting the parents of children with vision problems for a newly formed sight-saving class. The following year I entered school once again. I stayed in a regular classroom. I would only go to Mrs. Bromley’s class when I needed to read things in large print or to have material read to me. My ability to do my school work improved.

[Later] I began to develop attributes that would serve to bolster the assistance the new class was giving me. The fear of not being able to do things like other people went away. I became stronger emotionally. Many of my problems were dealt with through accommodations offered. The sight-saving materials and other resources were the support system I needed for success. As I moved up in grade level my parents and teachers would meet to set realistic goals for my educational success. With these elements in place, I progressed through school.

I learned a lot about myself during those years. I grew in awareness of myself. I realized that a big portion of my success depended on me. I had to speak up for myself.
This analysis of my own learning needs seems to parallel a needs pattern of many learning disabled students. There is a strong indication that we as teachers of the learning disabled need not only to develop ways to accommodate our students’ learning style and intelligences. We must also assist our students in acquiring ways to improve in the ways they may feel about themselves. Being sound emotionally, being aware of oneself, being able to participate in the goal-setting process, and being able to persevere in a course of action just may be the real keys for success.

**Developing the Instructional Plan**

Using the profile of the learner developed in the assessment process, solid decisions can be made on an instructional plan for the learner. The development of this plan should include

- Setting of realistic and obtainable goals
- Breaking down of goals into short-term objectives
- Transforming the short-term objectives into unit and lesson plans
- Making the instructional plan LD-smart

The instructional plan should be developed through a joint effort of the practitioner and the learner.

We have examined curricular options that a person with LD may need, noting the important role of self-advocacy. We’ve recognized that planning with rather than planning for is a critical early step in fostering that very self-advocacy. But how do we do it—planning in partnership with students?

Some tools from Equipped for the Future (EFF) may prove helpful. EFF, now a national initiative to build a new adult education framework, began with what adult learners said they needed from adult education. (To learn more about EFF, go to <http://www.nifl.gov/lincs/collections/eff/eff.html>.)

**EFF Purposes Chart:**

“What do you want to know and be able to do?”

Several years ago, adult education students around the country wrote about what they needed to know and be able to do in the 21st century. The four purposes drawn from their writings formed the basis for
Equipped for the Future. Those purposes are listed in the table below and reworded in first person to encourage the active role of adult learners in considering their goals.

As you read the chart, think about how you might use it, along with other tools, as a springboard for discussions with your student(s). One possibility is simply asking a question similar to the one that launched EFF, “What do you want to know and be able to do as a result of adult education?”

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<th>EFF PURPOSES</th>
<th>LD CURRICULAR OPTIONS</th>
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| **Access:** to gain access to information so I can orient myself in the world. | • *Basic skills:* Do I need to improve basic skills for acquiring and expressing information?  
• *Critical content:* Do I need to learn critical content necessary for daily interactions and responsibilities? |
| **Voice:** to give voice to my ideas and opinions with the confidence that they will be heard and taken into account. | • *Social skills:* Do I need to learn social skills for interacting successfully with others?  
• *Self-advocacy:* Do I need to learn self-advocacy strategies for communicating my interests, needs, and rights? |
| **Action:** to solve problems and make decisions on my own, acting independently, as parent, citizen, and worker, for the good of my family, my community, and my nation. | • *Social skills:* Do I need to learn social skills for interacting successfully with others?  
• *Self-advocacy:* Do I need to learn self-advocacy strategies for communicating my interests, needs, and rights? |
| **Bridge to the future:** to keep on learning in order to keep up with a rapidly changing world. | • *Learning strategies:* Do I need to acquire learning strategies for completing tasks efficiently and effectively? |
Using the EFF Skill Wheel to Set Goals
Another way to look at planning for learning is noticing where the EFF Standards (that address the purposes) match with LD curricular options. (See Appendix D for a complete, reproducible copy of the EFF skill wheel.)

### EFF SKILLS CATEGORIES | LD CURRICULAR OPTIONS
---|---
Communication | • Part of social skills, self advocacy, and basic skills
Interpersonal | • Part of social skills and self-advocacy
Decision making | • Skills needed for self-advocacy
Lifelong learning | • Learning strategies assist adults with LD in being lifelong learners because, through the use of the strategies, they learn how to learn.

**EFF Standards for Adult Literacy and Lifelong Learning**
Using EFF Role-Maps to Plan for Learning

Equipped for the Future recognizes that adults have many roles: as individual learners, parents/family members, workers, and citizens/community members. The EFF role-maps can be an extremely natural “way in” to conversation about learning needs and goals. (See Appendix D for complete, reproducible copies of the EFF role-maps.)
Tammy, an adult learner, and her teachers used the role maps as a springboard for thinking through her goals and learning plan. Notice how her teachers guided her in this process.
Using a Goal Setting Form From EFF Teachers

Another planning tool you may choose to use (alone or with some of the other tools) is a Goal-Setting Form. (See Appendix D for reproducible copies of this and other tools described in this section.)

You have talked with your student about her priorities and planned together the things on which she will focus. You are now ready to adjust your teaching in ways that will be more effective for struggling students. In Chapter 4, we look at keys to effective LD instruction and then share tools and strategies for implementing that instruction.