

# The Self-Advocacy Strategy

*For enhancing student motivation & self-determination*

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AN EDUCATION & TRANSITION PLANNING PROCESS

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energizer of human behavior that is based on the individual's need for competence and self-determination (i.e., internal control). In other words, people 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 when they act out of choice, based on their perceptions of personal needs (i.e., self-determination). Moreover, 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 (Borkowski, Carr, Rellinger, & Pressley, 1990; Deci & Ryan, 1985; Zimmerman, 1994). Furthermore, Wehmeyer and Schwartz (1997) contend that self-determination is predicated upon an individual's acquisition and use of specific skills, behaviors, and attitudes that are learned across the life span and that are associated primarily with reaching adulthood and fulfilling adult roles.

Motivation and self-determination strategies are techniques and procedures that can be used to involve students in key aspects of the teaching-learning process, thereby increasing their intrinsic commitment to learn. These strategies focus on helping students identify and make use of their own learning strengths. They help students learn how to identify and prioritize their needs, choose and monitor their goals, and successfully work toward attaining goals. Thus, motivation and self-determination strategies refer to specific skills, behaviors, and processes that students can acquire and use to increase their interest in and efforts toward learning while gaining greater control over their own lives.

## WHY ARE MOTIVATION AND SELF-DETERMINATION STRATEGIES IMPORTANT?

Even when students possess the necessary prerequisite skills, knowledge, and strategies to learn new information, complete assignments, or expand their skills, some do not succeed. A commonly cited reason for their failure is their lack of motivation to learn. Some students who have experienced a history of difficulty, failure, or frustration with learning are reluctant even to attempt to learn a new skill or try to complete a new task. Others begin, but they set unrealistic goals and give up before they reach them. Still others appear apathetic and fail to set educational or career goals for themselves and expect teachers, counselors, parents, and others to provide the necessary directions, feedback, and support.

Two important implications are associated with the constructs of intrinsic motivation and self-determination in relation to these students. First, if education and/or transition programs for this population are to be effective, these students need to be taught how to

reflect on, explore, and act on their beliefs about the causes of their success or failure, both in and out of school. Second, teachers, parents, and others need to involve these students in determining the direction for their lives and in advocating for their learning and developmental needs, outcomes, and experiences. Indeed, these students need ongoing opportunities that allow them to be actively involved in planning, implementing, monitoring, evaluating, and adjusting their individualized education programs (IEPs) and/or their individualized transition programs (ITPs). In short, efforts to enhance the intrinsic motivation and self-determination of students may need to be directed in a multi-fold approach. This approach involves teaching students how to make informed decisions and choices about their learning and development, providing them with opportunities to make these decisions and choices, teaching them how to take action in the pursuit of their goals, and giving them opportunities to pursue their goals.

Thus, motivation and self-determination strategies are important because they can be used by students to increase their involvement in key decision-making and planning processes. They enable students to decide what educational or transitional goals are important to them and to consider how their strengths and needs affect their ability to meet those goals. They also enable students to set goals and monitor their progress toward achieving those goals. These strategies can provide students with a sense of direction and control over the learning process in settings both in and out of school.

## THE SELF-ADVOCACY STRATEGY

### What is the Self-Advocacy Strategy?

The *Self-Advocacy Strategy* is a motivation and self-determination strategy that students can use when preparing for and participating in any type of education or transition planning conference. These conferences can be formal or informal meetings between the student and either one other person or a group of people. The steps of the strategy provide students with a way of getting organized before a conference and with techniques that can be used to effectively communicate during a variety of conferences or meetings.

There are five steps involved in this strategy. The first, **Inventory**, gives students an opportunity to determine and list their perceived education and/or transition strengths, areas to improve or learn, education and transition goals, needed accommodations, choices for learning, and for older students, goals associated with their age-of-majority rights. This information is entered on sheets called the *Education Inventory* and the *Transition Inventory*, which the student takes to the

conference or meeting. The student uses the remaining steps of the strategy (Steps 2 through 5) when communicating during a conference or meeting. Specifically, the second step, **Provide Your Inventory Information**, focuses on providing input during the conference or meeting. **Listen and Respond**, the third step, relates to effectively listening to others' statements or questions and responding to them, while the fourth step, **Ask Questions**, involves asking appropriate questions to gather needed information. Finally, **Name Your Goals**, the fifth step, involves communicating personal goals and ideas on actions to be taken.

The acronym "**I PLAN**" is used to help the student remember the five steps of the strategy. Each letter in "I Plan" serves to cue the student to use the step of the strategy (e.g., "I" cues "Inventory," "P" cues "Provide your inventory information," etc.). Hence the *Self-Advocacy Strategy* is often referred to as the "I PLAN" Strategy, and its steps are often referred to as the "I PLAN Steps."

## What is the relationship between Education Planning Conferences and Transition Planning Conferences?

This manual includes instructional procedures for two types of conferences: Education Planning Conferences and Transition Planning Conferences. In some states, these planning conferences are conducted independently of one another. In other states, education and transition planning can take place in the same conference or meeting.

To decide which type of conference to conduct, teachers should think about their students and whether they need to focus primarily on education planning, transition planning, or both. For elementary-aged students, Education Planning Conferences are usually the best choice. Nonetheless, even at the elementary level, transition and career education should be viewed as an important part of the learning process. Therefore, teachers need to encourage elementary-aged students and their parents or guardians to plan optimistically for the future of their children including post-secondary education and employment beginning at the elementary level. For adults who have already left high school, Transition Planning conferences are probably more appropriate. For junior-high or high-school students, both Education and Transition Planning Conferences are probably appropriate. However, teachers should remember that beginning at age 16, and updated annually, all students who are eligible for special education and related services are required by law to have a statement of the transition services needed by the student. The statement should relate to various courses of study (such as participation in a work-study programs, vocational

education, employment planning, or advanced placement courses) that are to be addressed as part of the student's IEP. Furthermore, by age 16 (or younger, if determined by the student's IEP team or committee), each student's IEPs must contain a description of the responsibilities of other agencies (such as vocational rehabilitation, the Social Security Administration, Supplemental Security Income, Medicare and Medicaid, technical training, and other support services) or other linkages needed to facilitate the successful transition of the student into his or her community, adulthood, and the work force.

Because of the differences between the two types of conferences, this manual includes two different Model and Prepare Stages. The first, Stage 3A, provides instructions for conducting *only* an Education Planning Conference. The second, Stage 3B, provides instructions for conducting *only* a Transition Planning Conference. When combining the two conferences into one, instructors should first follow the directions for education planning in Stage 3A and then implement an abbreviated version of Stage 3B. When both topics are being covered in the same conference, parts of the *Education Inventory* and the *Transition Inventory* can be selected to reflect the unique needs of a student. For example, the career planning section of the *Education Inventory* might be omitted since the *Transition Inventory* contains a section on career planning. Parts of the *Transition Inventory* might be selected as more appropriate for some students than others. In addition, one student's *Transition Inventory* may reflect his needs to focus on independent living skills, while another student's *Transition Inventory* may reflect her need to focus primarily on future education needs.

## When can students use the Self-Advocacy Strategy?

Once students become familiar with the strategy, they can use it prior to and during any type of conference or meeting such as:

- An informal conference conducted by instructors, parents, and other professionals with students who may be exhibiting problems in learning;
- An Individualized Education Program (IEP) conference that is held at least annually for all students receiving special education services;
- An Individualized Transition Planning (ITP) conference held for the purpose of planning and specifying needed transition services for students with disabilities, no later than age 16, and when appropriate, beginning by the age of 14 or younger;
- An Individualized Vocational Education Program (IVEP) conference held at least annually for special education students receiving vocational education;
- A career planning conference conducted by a school counselor;
- A vocational planning conference conducted by a

vocational evaluator, counselor, or career counselor;

- A Vocational Rehabilitation Planning (IVRP) conference conducted with a rehabilitation or vocational evaluator or counselor;
- Disposition meetings or conferences for adjudicated youth by court-appointed social workers, probation officers, and youth evaluators; and
- A job interview or a performance evaluation.

## Who might benefit from learning this strategy?

Adolescents and adults in a variety of situations can benefit from learning the *Self-Advocacy Strategy*. If students (e.g., those in public and private educational settings and adults in vocational, rehabilitation and community settings) are expected to be active participants in decision-making processes that directly affect their education and future lives, the strategy will be beneficial. The strategy may also be helpful for parents who are expected to participate in the educational decision-making process, including parents who are expected to play a continuing significant role in planning their child's education and development activities. To date, students in upper-elementary, middle-, and high-school settings and young adults in vocational and post-secondary settings as well as parents have learned this strategy and have found it to be beneficial.

Although instruction in the *Self-Advocacy Strategy* can be implemented with all types of students, it has been designed specifically for those students who have developed patterns of negative attitudes and avoidance behaviors toward school, learning, and development. Instruction in the *Self-Advocacy Strategy* provides students with the skills needed to plan for and attain successful independent adult lives. These skills include learning to identify current and future needs, setting goals, planning and completing tasks, and taking responsibility and control over one's growth and development. Students can use the strategy to speak up and ask for what they need on their own behalf. That is, it provides students with skills for effectively communicating information, asking questions, comparing ideas, negotiating, and making informed decisions and choices. It also builds self-confidence by enabling students to take risks and initiate actions to develop and expand their potential.

These skills are sufficiently complex and numerous so that learning them can be difficult for students with learning disorders or a history of learning problems. Such students often require highly structured and sequenced programs that integrate the skills in a meaningful way while allowing students to master the skills at their own pace. Because the instruction described in this manual has been carefully sequenced in a way that promotes success, students with learning problems can readily master the complex cognitive, social, and communicative skills required and integrate them into their repertoires at an automatic level.

## Who might want to teach the strategy?

General and special education teachers, school counselors, career and special needs counselors, rehabilitation counselors, child advocates, and youth counselors, to name a few, might be interested in teaching this strategy. Any person who orchestrates education, transition, or career conferences and wishes to empower students or clients to make informed and responsible decisions and take ownership of their lives might find teaching this strategy helpful.

Four considerations are necessary in deciding to teach the *Self-Advocacy Strategy*. One consideration is the desire to enhance student motivation, self-determination, and personal responsibility for learning and development. A second consideration is the willingness to create and maintain environments that provide students with opportunities for success. Opportunities or situations where students can make decisions and choose learning experiences but have little chance of attaining success are unproductive. A third consideration is the willingness to recognize that differences often exist in individual perceptions of educational and transition needs and goals and to accommodate those differences. Such individual differences may need to be addressed and accommodated when facilitating students' and parents' use of the strategy to plan education and transition programs. One way to address these differences is to examine available programs and services to make sure that a variety of materials, content, and options or choices are offered. A fourth consideration is the willingness to provide students with opportunities to determine their learning and development needs and accommodate those needs with choices. If students are not allowed to pursue their perceived needs with aligned choices, their interest and effort in working toward their goals can be undermined. Keeping these considerations in mind will help to maintain students' motivation and self-determination toward learning and achievement in school and in life.

## Are there any prerequisite skills for learning this strategy?

The major prerequisite for students learning this strategy is a willingness or basic motivation to do so and the ability to construct thought and communicate (e.g., through words, gestures, computerized systems, etc.). The only students who have not benefited from exposure to this strategy are those who are unmotivated or unwilling to succeed in learning situations. These are students who have made a conscious decision to resist or reject any opportunities for assistance. In short, if students are willing to set goals, make plans, and take steps to improve themselves, they will be able to respond to instruction in this strategy in a positive way.



## How much time is required for students to learn the strategy?

Research has shown that approximately six hours of instructional time are required for students to learn the strategy when the focus is only on education planning. Students typically spend six or seven 50-minute class periods on consecutive days learning the strategy in groups of 4-8, with an additional 15-20 minutes for demonstrating mastery. One or two additional 50-minute class periods are generally necessary for transition planning. Students should initially learn the strategy a week or two before an upcoming conference or meeting or at the beginning or end of a school year when planning for the year. For subsequent conferences or meetings, students generally spend an hour updating their *Inventory* and reviewing the strategy. This review session should take place several days prior to the conference or meeting.

As a support to the above activities, an additional instructional session can be held for a group of 3-4 students and their parents. During this session (which can last approximately one hour), the strategy can be described and parents can be asked to develop an *Inventory* reflecting their perceptions of their son's or daughter's learning strengths, needs, goals, interests and, if applicable, transition needs. During this process, students can assist their parents by discussing the strategy and their inventoried information.

## What results can be expected from students who learn this strategy?

The strategy described in this manual has been tested with middle- and high-school students with learning and behavior disabilities who participated in their annual IEP conferences. Results of the field tests indicated that when the strategy is taught according to the procedures outlined in this Instructor's Manual, the quality and quantity of students' verbal contributions during individual conferences increased substantially and were at higher levels than the contributions made by students who received only a general overview of the content and format of IEP conferences.

In one study with high-school students with learning disabilities (Van Reusen & Bos, 1994), students and their parents were either trained in a version of the *Self-Advocacy Strategy* or given (in the comparison group) an informational lecture including an opportunity to ask questions on the purpose and procedures of IEP conferences. During actual conferences, all students were asked a standard set of questions. The overall results of the study showed the students who learned and used the strategy made more statements about goals during their conferences than students who did not learn the strategy. The strategy-instructed students also provided significantly more information about their learning strengths

and areas to improve than students in the contrast group.

In another study with junior-high students with learning disabilities (Bos & Van Reusen, 1987), students were either trained in using the strategy or given (in a comparison group) an overview of IEP conferences. During each conference, student responses were recorded and analyzed for the number of contributions made in specific categories related to educational planning. The average number of each type of contribution was as follows:

<u>Type of Contribution</u>	<u>Average Number of Contributions</u>	
	Trained Group (N=48)	Comparison Group (N=24)
Learning strengths	49	4
Areas to improve	21	3
Goals for now or in the future	19	12
Choices for learning	20	12

In a third study (Van Reusen, Deshler, & Schumaker, 1989), the educational and future goals that high-school students with learning disabilities specified in their conferences were matched with goals appearing in their IEP documents. For students trained in using the strategy, 86% of the goals appearing in the IEP documents were specified by those students. In contrast, only 13% of the goals appearing in the IEP documents for the comparison students were specified by those students.

In all three studies, trainers and conference participants noted the following additional benefits for learning the strategy:

1. Students increased their awareness of how general skills such as reading, writing, and math can be broken into more specific skills.
2. Students' awareness of their learning strengths increased.
3. Students identified more specific and future-oriented career goals than in previous conferences.
4. Students assumed active roles during conferences.
5. Students reported they felt that they played an important role in the decision-making process.
6. Parents reported that their sons and daughters played an important role in the conference.
7. Instructors reported that the overall tone of the conferences was more positive and that more emphasis was placed on what the individual student could do rather than on what the student could not do than in previous conferences.
8. Instructors and parents reported generalized use of the strategy by some students. For example,

instructors noted that students used the strategy to successfully negotiate course modifications with other instructors. Parents commented that their adolescents used the strategy when interviewing for jobs and postsecondary school.

## HOW TO TEACH THE SELF-ADVOCACY STRATEGY

For a motivation strategy like the *Self-Advocacy Strategy* to serve students well, it must be valued by the students and learned to an automatic level. In other words, students must recognize the benefits of learning the strategy and, when they need to use it, they should not have to concentrate on remembering how to use the strategy or the individual strategy steps. To help ensure that students have made a commitment to learn the strategy to the necessary degree of proficiency, a specific instructional sequence needs to be followed and instruction needs to be based on a set of principles. The methods and principles described in this section have been found to be important for instructional success with the *Self-Advocacy Strategy*. **Read and reread this section.** If your students are not making the anticipated progress, review this section, and evaluate your instructional practices in light of the principles expressed.

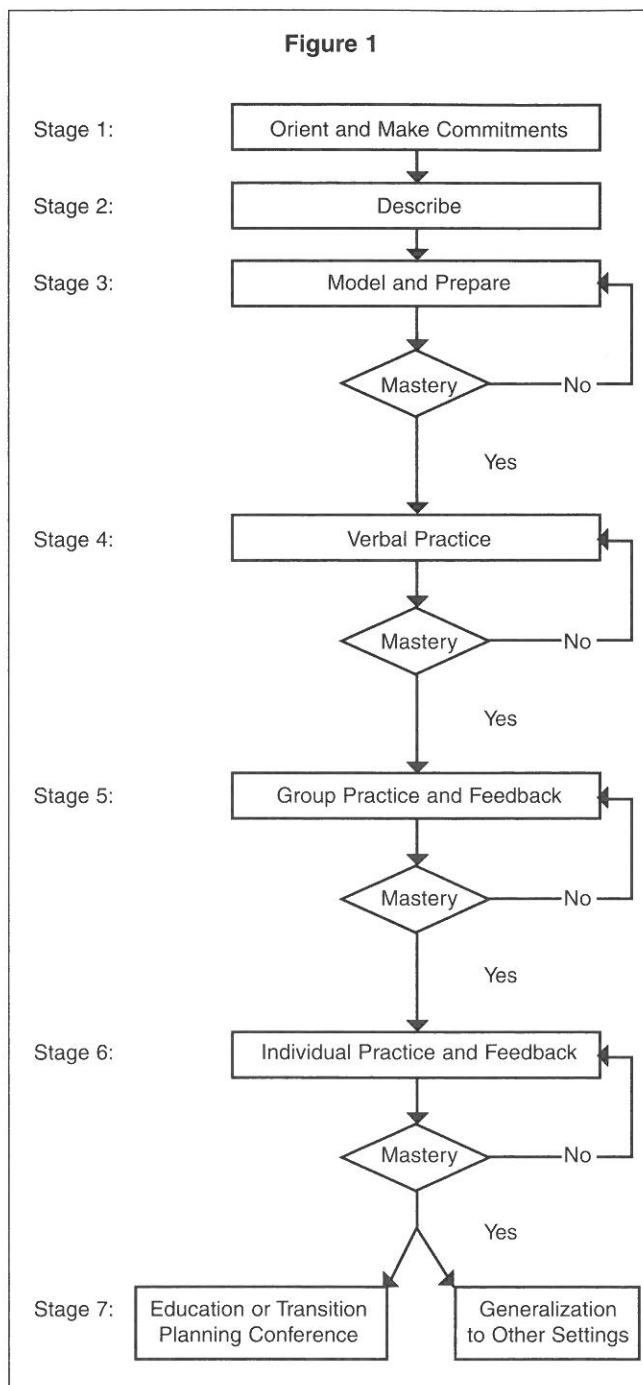
### The Instructional Sequence

The *Self-Advocacy Strategy* is taught using a modified version of the acquisition and generalization stages that have been developed and expanded as part of the Strategies Intervention Model (Ellis, Deshler, Lenz, Schumaker & Clark, 1991). Students with learning and behavior problems who participated in field-test studies mastered the *Self-Advocacy Strategy* when these instructional stages were implemented as described in this manual. Figure 1 in the next column and the description below summarize these instructional stages and the sequence to follow.

**Stage 1: Orient and Make Commitments.** During this stage, students are introduced to the concept of education and transition conferences, the purpose of the *Self-Advocacy Strategy*, and how learning this strategy gives them more power and control over their own learning and development experiences in and out of school. Students are also asked to make a commitment to learn the strategy, and the instructor makes a commitment to teach the strategy to them. Experience in working with older students has indicated that student effort and motivation throughout the instructional process is greater if students make a verbal or written commitment to learn the strategy and if their instructor makes a similar commitment to teach it.

**Stage 2: Describe.** The Describe Stage is

Figure 1



designed to paint a picture that details the nature of the skills to be taught and the advantages of using those skills. First, education and/or transition conferences are defined. Second, the type of conferences or meetings in which the student is likely to participate and the general characteristics of those conferences or meetings are described. Third, students are shown how they can personally benefit by attending conferences and meetings and applying the *Self-Advocacy Strategy*. An interactive format is used here, and students are given exam-



## STAGE 3B: MODEL AND PREPARE FOR TRANSITION PLANNING CONFERENCES\*

### What your goals are:

To provide students with a detailed demonstration of:

- How to complete the *Transition Inventory*.
- How to provide inventoried information during a conference.
- How to listen and respond during a conference.
- How to ask questions during a conference.
- How to name goals during a conference.

To supervise the students' preparation of the *Transition Inventory*.

### What you need:

- Chalkboard or other writing surface
- Writing implement for chosen writing surface
- Pencils and lined paper
- *Cue Card #15, #16, & #17* (pp. 149-151) (one per student)
- *Transition Inventory* (pp. 170-173) (one per student)
- Student folders
- Pencils and paper (for student notes)
- *Transition Skills Lists* (pp. 174-181) (one packet per student or student pair)
- *Leisure & Recreation Activities List* (p. 182) (one per student or student pair)
- *Accommodations List* (p. 183) (one per student or student pair)
- *Potential Resources List* (p. 184) (one per student or student pair)
- *Transition Conference Model Cards* (pp. 185-186)
- A completed *Transition Inventory*
- *Management Chart*

### How to prepare:

This instructional stage is divided into two lessons. Lesson 1 focuses on the Inventory Step of the strategy and provides activities for completing the *Transition Inventory*. Lesson 2 focuses on the "PLAN" Steps in the strategy and provides activities for you to model how to effectively communicate during a conference.

#### For all lessons:

- 1. Read the instructions in this section.** Familiarize yourself with the order of events and the information you will share with the students. For each lesson, read the instructions using the bold-face headings as cues to remind you of what to do. Review the script, and think about how you will use and adapt it to your teaching style and your students. Think of examples that are relevant to your students' lives.
- 2. Plan when you will present the two lessons.**

\* This manual contains two sets of Stage 3 directions. If you are preparing students for a Transition Planning Conference, use this set of instructions, pp. 70-91. If you are preparing students for an Education Planning Conference, use the instructions on pp. 46-69.

- 3. Practice using the strategy.** Run through the demonstration and lesson activities by yourself to become fluent in the use of the *Self-Advocacy Strategy*. When you demonstrate each step, you should be able to focus on the students as much as possible. Therefore, be well prepared. All activities should appear sequenced and logical.

#### **For Lesson 1:**

- 1. Review the *Transition Skills Lists*, the *Leisure & Recreation Activities List*, *Cue Cards #15-17*, the *Accommodations List*, and the *Potential Resources List*.** The *Transition Skills Lists* (pp. 174-181), the *Leisure & Recreation Activities List* (p. 182), *Cue Cards #15-17* (pp. 149-151), the *Accommodations List* (p. 183), and the *Potential Resources List* (p. 184) are partial lists. Review these lists, and edit them to be relevant to your school and community. The resources in Appendix C can be used to identify additional sources of information. To obtain further information about age-of-majority rights in your state, contact your state Department of Education, the Attorney General's office, or the American Bar Association.
- 2. Gather the needed materials.** Make sufficient copies of the *Transition Inventory*, *Transition Skills Lists*, *Leisure & Recreation Activities List*, *Cue Cards #15-17*, *Accommodations List*, and *Potential Resources List*. The *Cue Cards*, *Skills Lists*, the *Leisure & Recreation Activities List*, the *Accommodations List*, and the *Potential Resources List* can be made into stapled packets that pairs of students can share and that can be collected and reused by other students.
- 3. Make visual aids.** Make transparencies or poster-sized copies of the *Transition Inventory*. Make transparencies or a paper copy of the *Transition Skills Lists*, the *Leisure & Recreation Activities List*, *Cue Cards #15-17*, the *Accommodations List*, and the *Potential Resources List* for your reference during your teaching.
- 4. Consider goals for each student.** Think about each student's strengths and interests. Think of one or two transition goals you might suggest in each area in case the students need ideas.
- 5. Consider coordinating this with a unit on career education.** In completing the *Inventory*, students will have to consider many aspects of adult life. If students have had limited exposure to career education, coordinating the *Inventory Step* with a unit on career education and planning for adult life may be helpful.

#### **For Lesson 2:**

- 1. Prepare the *Transition Conference Model Cards*.** Make one copy of each of the *Transition Conference Model Cards* (pp. 185-186) and cut them on the lines indicated. Assign each card to a student. When making assignments, take into account the students' reading ability. Write a student's name on each card. Write your first name in the blanks on the *Model Cards*. On a separate piece of paper, make a list of the situations and the students assigned to each situation for your reference during the demonstration.\*

\* There are six student parts in the demonstration. If you have more than six students in the group, you can either prepare additional cards or have the additional students critique your behavior. If you have fewer than six students, give some students more than one role to play as needed.

## **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**



## **The Self-Advocacy Strategy**

**Cue Card #2**

# **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**