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Self-Management Systems for  
Student Motivation and Self-Efficacy

by

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Submitted in Partial Fulfillment of the

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### Abstract

The guiding question for this project was, What is a user-friendly self-management intervention handbook for teachers that can impact student motivation and self-efficacy in order to increase academic achievement and promote independence for students with identified special needs and/or behavioral challenges? The methodology for creating this project involved extensive research and direct experience of using self-management interventions that support students with identified special needs in accessing their learning. The author examined empirical studies, curriculum resources, and various self-management behavior interventions with the purpose of determining ways in which self-management interventions can impact and develop motivation and self-efficacy for students who are introduced to the self-management tools included in the product of this project, a handbook for teachers entitled, *The Leader in Me Self-Management System Handbook for Elementary Educators*. Included in the handbook are chapters on the seven habits of happy students, sample self and match tools for motivating students using the 7 habits, and how to customize and use the Self and Match for a particular student.

*Key words:* Covey's seven habits, inclusive education, motivation, self-efficacy, self-management systems

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## **Chapter One**

### **Introduction**

As a special educator working directly with students impacted by attention deficit hyperactivity disorder (ADHD), high functioning autism, emotional disturbance (ED), and other identified special education needs, I am often collaborating and reaching out to colleagues about the best ways to engage our students in the most effective manner possible. Forwarding inclusion of all students in general education and creating the least restrictive environment for learning has become a professional goal and reality for me. Within inclusive classrooms, I have found that increasing all learners' access to the general education curriculum has been a challenge that requires support and collaboration from the entire school site.

### **Students with IEPs**

#### **and the Need for Behavior Support Strategies and Systems**

In today's schools, academic achievement is measured in many ways via traditional forms of recording student data, such as report cards, letter grades, and performance based on rubrics. In addition, the academic achievement of students with Individualized Education Program (IEP) plans is measured by progress toward achievement of IEP goals through the use of a Universal Design for Learning (UDL) approach to differentiating and modifying assignments and lessons. For students with identified special needs and behavioral challenges, academic achievement is more difficult to attain, as other factors impede on their learning. Some behavior challenges include physically aggressive behavior (i.e. hitting, kicking), tantrum behavior (i.e. crying, dropping, and refusing to move), work refusal, and noncompliance (i.e. running around the classroom, eloping, making noises, refusing to participate in or complete a task,). Such behaviors make students unavailable for learning and attending to instruction for the

same amount of time, resulting in a decrease amount of task completion as compared to typically developing peers.

### **Rationale for a Quick Guide to Self-Management Systems and Tools for Educators**

Students with identified special needs have a lower academic success rate than general education peers, despite support systems (e.g., small group focused instruction, modification of assignments, extended due dates) being put into place. Oakes, Lane, Cox, Magrane, Jenkins, & Hankins (2012) note that “academic performance is negatively impacted by low academic engagement, limited motivation, and limited self-determined behaviors” (p. 548). For students with identified special needs, factors that often impede learning include disruptive behavior, deficits in attention, and the characteristics of their identified disability.

Student development of self-management skills (e.g., goal setting, self-recording, self-monitoring, self-reinforcement) has been connected to an increased amount of academic engagement and achievement for students with behavioral challenges. The use of self-management systems also has resulted in increases in students’ self-concept, motivation, and self-efficacy and decreases in student anxiety.

Two key factors in predicting academic achievements are motivation and self-efficacy. Students may exhibit what appears to be a lack motivation in the classroom due to variables such as self-consciousness due to feeling different or behind academically as compared to classmates. With regard to self-efficacy, students with identified special learning needs may feel dependent upon their support providers’ prompting in order to complete a task and incapable of perform tasks independently.

What are supports to enable students to engage and achieve? Oakes and colleagues (2012) argue for tiered supports for all students, stating “the critical nature of the relation between academic achievement and academic enablers supports the use of tiered models of prevention integrating academic, social, and behavioral supports in the school setting” (p. 550). The use of self-management systems is one tiered support that promotes academic, social, and behavioral engagement. Self-management systems include self-monitoring contracts, check-in and check-out systems, and task checklists. Newman, Buffington, O’Grady, McDonald, Poulson, and Hemmes (1995) argue for self-monitoring and self-reinforcement self-management systems to replace staff-directed behavior management strategies in order to help students become more independent and less reliant on others for behavior management. The implementation of self-management systems and tiered models of supports in a school environment promotes equity in education, because every student is included.

### **Purpose and Significance of Project**

Within the schools in which the author has worked, there appears to be a gap in the (a) supports for engaging students with behavioral challenges in instruction and (b) strategies to promote student motivation and self-efficacy that might aid students to decrease behaviors interfering with learning. In response to this need, the author decided to learn about, use, and adapt the Salter and Croce (2014) Self & Match system in order to create an easy-to-use handbook for teachers.

The guiding question for this project is the following: *What is a user-friendly self-management intervention handbook for teachers that can impact student motivation and self-efficacy in order to increase academic achievement and promote independence for students with identified special needs and/or behavioral challenges?* The purpose of this project, then, is to

develop a quick guide or handbook for teachers that features examples of research-based self-management tools and systems that effectively address the behavioral and academic challenges experienced by students with identified special needs and behavioral challenges, with the goal of optimizing these students' learning potential. The self-management system presented in the guide is both a tool for engaging students during instruction and a data collection system for teachers to daily monitor a student's behavior. The handbook teaches educators how to use a Leader in Me Self & Match (LMSM) system to support students to develop their abilities to engage in instruction, increase their motivation and independence (self-efficacy) with tasks, and increase academic achievement. In conjunction with the establishment of the LMSM system, teachers are empowered to support students who present behavioral challenges to engage in learning. The handbook is designed to be used within inclusive elementary classrooms where specialized academic instruction (SAI) is delivered to students with mild and moderate disabilities through collaboration among general and special educators in general education classrooms. The content of the guide also is relevant to and useful in more restrictive educational settings such as resource support classrooms, specialized SAI settings [classes designed to provide social emotional academic support (SEAS)] as well as special public and non-public schools.

### **Definition of Key Terms**

The following are key terms that are used in the subsequent chapters and the handbook that is the product of this project.

#### **Achievement Motivation**

Achievement motivation has been defined as “a need that drives an individual to improve, succeed, or excel current achievements, and results in an optimal state of arousal to meet the demands of tasks to be performed (Gut, Heckmann, Meyer, Schmid, and Grob, 2011, p. 375).

#### **Differentiating Instruction**

According to Starr (2004), differentiating instruction means “shaking up what goes on in the classroom so students have multiple options for taking in information, making sense of ideas, and expressing what they learn. In other words, a differentiated classroom provides different avenues to acquiring content, processing or making sense of ideas, and developing products.”

#### **Inclusive Education**

Hardman, Drew, & Egan (2014) describe inclusive education as the delivery of special education services in such a way as to allow “students with disabilities [to] receive the services and supports appropriate to their individual needs within the general education setting” (p. 52).

#### **Individualized Education Program**

An Individualized Education Program (IEP) is the program developed for a student eligible for special education services that ensures and outlines that a child who has specialized instruction and related services will receive access and progress in the curriculum.

#### **Self-Efficacy**

Self-efficacy can be defined as regulation of “human functioning through cognitive, motivational, affective, and decisional processes” (Zimmerman, 2000, p.83).

### **Self-Management Interventions**

Self-management interventions are instructional and support strategies designed to “assist students in changing and/or maintaining appropriate behavior” (Mooney, Ryan, Uhing, Reid, & Epstein, 2005, p. 204). Common self-management interventions for school-aged students are self-monitoring and self-evaluation systems, goal-setting strategies and learning strategy instruction.

## **Chapter Two**

### **Literature Review**

Academic and behavior achievement of students with identified special needs is influenced by numerous factors including student motivation, self-efficacy, and character development. Academic and behavior success is facilitated by application of inclusive education practices and school-wide systems of academic and behavioral support (Villa & Thousand, 2016, 2017). Self-management systems are among the behavior supports that can be applied with individual students or school-wide as part of an inclusive approach to implementation of Individualized Education Plans (IEPs) which honor the importance of teacher feedback, student and teacher rapport, and on-going collaboration among students and teachers in a dynamic learning environment. This research review will first examine the notion of inclusive education and then examines the current research regarding student motivation, student self-efficacy, and self-management systems.

### **Inclusive Education**

Inclusive education serves both as an ideology and a practice within classrooms. The goals of inclusive education are to create a sense of belonging and promote the valuing of each individual within a recognized diverse learner population. This notion is reflected in Lauchlan and Greig's (2015) view of inclusive education as children and young people being included socially and educationally in environments where they feel welcomed and where they can think and progress (2015). Similarly, Frankel, Gold, and Ajodhia-Andrews (2010) view inclusion as the "active participation of every child as a full member of his or her family, community, and society" (p. 3). For students with IEPs, inclusive education also is the delivery of special education services in such a way as to allow "students with disabilities [to] receive the services

and supports appropriate to their individual needs within the general education setting” (Hardman, Drew, & Egan, 2014, p. 52).

As both of the researchers referenced above suggest, inclusive education is more than the physical presence of students with disabilities in the general education classroom, it also concerns the “quality of learning and participation rather than a common place of learning” (Glazzard, 2011, p. 56). Goals of inclusive education are for each child to be (a) valued and recognized for his or her abilities within the learning environment and (b) provided equitable access to curriculum content and non-academic experiences afforded any other student.

Inclusive education is not just a U.S. phenomenon; it is a worldwide movement. In 2005, the United Nations Educational Scientific and Cultural Organization issued international guidelines calling inclusive education a human right for all children. At U.N.’s 2008 International Conference on Education, 153 ministers of education and heads of delegation affirmed that “inclusive quality education is fundamental to achieving human, social, and economic development” (Villa & Thousand, 2017, p. 27). Historically, inclusive education has demonstrated positive impact on students, regardless of the intensity or type of disability, and has proven to show that students with special needs exposed and included in the general education classes do better academically and socially than their peers in non-inclusive settings (Villa & Thousand, 2016).

Simply placing a child in a general education classroom is not inclusive education. Inclusive education involves differentiated materials, instruction, and assessment processes to foster genuine student engagement with the curriculum. Placement *and* instruction needs to be purposeful and meaningful in order to maximize the potential educational and social benefits of inclusive education. In addition to bridging the gap between definition and practice of inclusion,

the principles of inclusion involve the application of instructional approaches that show respect toward all children with disabilities and their families and that are developmentally based, exceptionally focused, and embedded in all learning opportunities and classroom routines (Frankel & Gold, 2010).

When implementing inclusive practices within the classroom, perceptions of the teachers involved can be considered and addressed through education, support, and coaching. For example, Heiman (2004), who examined British and Israeli teachers' perceptions, expectations, and needs as they moved toward implementing inclusive practices, acknowledge educators' needs for expanded knowledge of students with learning needs and rationale for including them in their classrooms. Important to any change, including the process of moving toward more inclusive schooling, is to clarify what inclusive practices look and sound like, determining decision-making process, and examining and addressing teacher perceptions and expectations. Strategic instruction to improve teachers' understanding and self-confidence in teaching students with learning needs is a key component a change toward more inclusive practice.

Glazzard (2011) examined perceptions of British educators working to develop effective inclusive opportunities for students with special needs and how that negative perceptions on the part of teachers and peers, if unaddressed, can impact the school's commitment to inclusion. Parents can also experience resistance when they suspect that inclusion might not focus upon academic content. Important to acknowledge is that there almost always will be barriers to and negative or questioning perceptions regarding inclusion. Educators need to anticipate and be prepared to address skepticism. Villa and Thousand (2017) address these barriers and provide multiple rationale that can influence negative and questioning perceptions regarding inclusive education.

Wilkins and Nietfield (2004), recognizing that schools need assistance to develop and implement policies and practices that lead to effective inclusion experiences, examined teacher attitudes toward inclusion when training was and was not provided. While they found no effect of training, others have found that attitudes and perceptions often change after having had a positive experience, in this case, inclusive education (Villa & Thousand, 2017).

When examining teacher expectations and perceptions, consider Glazzard's (2011) observation of which expectations teachers have for their students that influence students' potential for achievement. Namely, if teachers believe that learners can transform themselves, they can rise to that expectation. If teachers do not believe or create this expectation, then the same self-fulfilling prophecy can occur in the opposite directions. The implication is that teacher perceptions toward inclusion need to be shifted to focus on the well-being of our students.

### **Student Motivation**

Motivation has many variations. Concerning academics, motivation is student drive for success. Martin (2008) defines motivation as "students' energy and drive to engage, learn, work effectively, and achieve their potential at school and the behaviors that follow from this energy and drive" (p. 240). Martin further explains the importance motivation plays in a student's academic achievement, arguing that it is *essential* to student interest in and enjoyment of school. Teachers and school culture can foster motivation; students are able to be and should be held accountable and acknowledged for their participation in their academics.

Thronsen (2011) argues that age-related differences exist in motivational beliefs of students; namely, a younger student's self-perception of competence is more "optimistic about... capabilities to succeed on academic tasks than older students" (p. 562). The difference of perceptions between age groups is an aspect to motivation that teachers need to recognize and

address. Building rapport with students and understanding their learning preferences and interests can empower educators to find and construct any array of motivators that address the diverse interests of all students.

Student achievement motivation is essential to engaging students in learning. Gut, Heckman, Meyer, Schmid, and Grob (2012) describe achievement motivation as a person's drive to improve, succeed, or excel, which results what they call an *optimal state of encouragement* to meet the demands of current achievement demands. The degree to which a student possesses achievement motivation predicts the degree to which a student is likely to remain engaged in academic tasks. A student interested in the content matter will feel excited to complete the task and likely engage; vice versa, a student with no interest in the content matter will not likely engage and will consider the material and related tasks too difficult or boring.

Educators can effectively motivate students when students generate a sense of value and worth towards the task at hand. Velez and Cano, (2012) define task value as "a quality of the task that contributes to the increasing or decreasing probability that an individual will select it" (p. 89). Stated otherwise, a person pursues a given task only if the value he or she places on that task is high. A teacher who creates and collaborates a rubric with students for a group project and explains how much the project completion will impact the students' overall grades might add a high task value for some students who appreciate recognition for quality work completion. Cooperative group learning structures wherein students are valued and rewarded for their collaborative and coordinated actions toward joint work completion may drive them to work together to complete the task and to receive an acceptable grade. Teacher recognition of the importance of task value motivation is essential for teachers when constructing learning experiences that promote achievement motivation.

Motivation can be enhanced when effective instructional techniques and processes (e.g., strategy use, metacognition, cooperative group) are employed with integrity to promote learning and engagement in pro-social behaviors (Thronsen, 2011). Self-monitoring and self-management systems can be employed by teachers to provide highly structured systems for providing students feedback and enabling students to reflect throughout their instructional day. Self-monitoring and self-management systems will be examined more closely in a following section of this chapter.

Students have the personal drive to understand a task, stay focused throughout, and execute the task completely with achievement motivation. Legault, Green-Demers, and Pelletier (2006) referred to the lack or absence of motivation with the term “amotivation” and defined it as “a state in which individuals cannot perceive a relationship between their behavior and that behavior’s subsequent outcome.” Lack of motivation may lead to a decrease in achievement such that no value is placed on the task or tasks at hand. Theoretical foundations of self-efficacy, explained by Velez and Cano (2012) state that “students may feel able to complete a specific task yet may not complete the task because they have no reason or incentive to do so.” When motivation is absent, students will have a lesser likelihood of completing various tasks that would otherwise benefit them in terms of academics. For non-preferred tasks, or tasks that an individual deems irrelevant or too difficult to tackle, students with no achievement motivation will display task refusal behaviors (i.e. ignoring instructions, off-topic conversations, etc.). Amotivated individuals may feel disintegrated or detached from their actions and behaviors thus placing little effort in executing tasks (Legault, Green-Demers, & Pelletier, 2006).

Although motivation is crucial for all students, in particular, students with identified special needs and/or behaviors that impede on their learning require support in order to maintain

that motivation. For example, students with Attention Deficit Hyperactivity Disorder (ADHD) and Disruptive Behavior Disorders (DBD) [i.e. Oppositional Deviant Disorder (ODD) and Conduct Disorder (CD)] have been “associated with deficient inhibitory control and enhanced sensitivity to motivational conditions compared to normal controls” (Gut, et al., 2012). In other words, the lack of impulse control and behavioral challenges of students with the aforementioned special needs have a tendency to be unresponsive to motivational factors within their learning environment. In relation to motivation, these students require an explicit and highly structured motivational system in order to complete tasks. This statement supports the idea that achievement motivation models (i.e. immediate positive feedback) improve the performance of students with behavioral needs in an academic setting. In all, the importance of task value in the maintenance of achievement motivation is crucial to the academic progress of students.

Students can also increase academic achievement by involving the participation of all educators and parents on a regular basis. Gut et al. (2012) states that “an increase awareness in parents, teachers, and school psychologists for [this] differential association between achievement motivation and performance could be of particular importance for achievement and academic self-worth in children with ADHD and at the same time minimize their risk of negative learning experiences.” This emphasizes the need for support of children, particularly those with identified special needs, in assisting their success academically. The participation of all of the educational team will allow for students to maintain their motivation levels and academic achievement.

In summary, achievement motivation is essential to student learning and academic progress. As Oakes, Lane, Cox, Magrane, Jenkins, and Hankins (2012) explain, the “strongest

predictor of student achievement ... is academic motivation followed by study skills” (p. 550).

When a student feels motivated students are more likely to progress academically.

### **Self-Efficacy**

According to Zimmerman (2000) self-efficacy involves “personal judgments of one’s capabilities to organize and execute courses of action to attain designated goals” (p. 83). Self-efficacy also can be thought of as “the personal beliefs [and] an individual’s confidence in [his/her] own ability to perform effectively specified tasks” (Yusuf, 2011, p. 2623). Stated otherwise, self-efficacy is an individual’s sense of self-worth and belief that he or she can accomplish a task or goal. Self-efficacy includes an individual’s ability to begin a task, plan out the procedure or steps of a task in a manner suited for him or her, and staying focused throughout the execution of the task in order to complete it. Self-efficacy influences whether an individual thinks in a self-enhancing manner, the degree to which a person can motivate in the face of adversity, the emotional quality of life, and decision-making to set the course for a life path. A student’s perception of self-efficacy influences his or her active involvement in every step of instruction.

Zimmerman (2000) emphasizes that self-efficacy focuses on “performance capabilities rather than on personal qualities...” is “multidimensional in form,” and is “sensitive to variation in performance context” (p. 83). These attributes of self-efficacy are relevant to students with disabilities and other identified special learning and language development needs in that the context of learning – the way in which a teacher structures learning so students can access and engage in content – is more important than any learning, physical, or social-emotional attribute a student may experience or exhibit. In other words, having a disability does not have to stand in the way of a student being and becoming self-efficacious. Teachers need to recognize that

perceptions of self-efficacy can vary based upon context variables such as sense of mastery of content (i.e. taking a math exam vs. a biology exam) and learning environments (i.e. learning in a noisy vs. quiet location). Further, teachers also need to appreciate that a student's current perception of self-efficacy influences his or her future functioning, requiring teachers to concentrate on creating learning and assessment conditions in which students perceive that their effort is making a difference with regard to their success in completing a task.

In education, self-efficacy and its theoretical foundations have been linked to gains in student persistence and skill attainment (Velez & Cano, 2012). According to Throndsen (2011), "children with higher perceptions of self-efficacy subsequently exert more effort in the face of difficulty, persist longer, and achieve higher success on arithmetic tasks than their less efficacious counterparts" (p. 561). Students with strong sense of self-efficacy are more confident in their ability to achieve academically, which maintain their engagement throughout learning tasks. Stated, simply, success begets success.

Self-efficacy can be positively influenced by mentors and care providers. As Velez and Cano (2012) explain, "self-efficacy...emphasiz[es] the interactive nature of human agency, thus allowing counselors, teachers, therapists, and others to develop interventions and modifications to improve the psychological well-being of the individual" (p. 89). In other words, the self-efficacy construct offers educators and other specialized educational service providers a construct for crafting appropriate supports.

In summary, self-efficacy is an individual's own belief that they are able to complete a task and accomplish a goal. Students with behavioral challenges often have a lower perception of their self-efficacy due to factors - disruptive behaviors and deficits in attention - that impede on

their learning. In order for educators to develop the self-efficacy perceptions of such students, an intervention and tool can be utilized to provide support in that area.

### **Self-Efficacy in Action: Application of Covey's Seven Habits**

As the implementation of self-efficacy increased in the educational settings, the author also decided to learn more about Covey's '7 Habits of Highly Effective People', as applied to children and teens by examining *The leader in me: How schools around the world are inspiring greatness, one child at a time* (Covey, Covey, Summers, & Hatch, 2014), *The 7 habits of happy kids* (Covey, 2008), and *The 7 habits of highly effective teens* (Covey, 2014). The author attended the school district in which she currently works. The school district used Covey's 7 habits when the author attended middle school. Currently, the school district uses Covey's 7 habits as the norms for students across the district and within the author's elementary school.

As a special educator, the author has noticed that there are students who need support to engage in the 7 habits. At the time that this project was initiated, there were no structured and explicit tools for having students set goals, track performance of, reflect upon, and be recognized for their use of one or more of the habits. The handbook that is the product of this project is designed to bridge the gap between student knowledge of the 7 habits and their ability to use them.

### **Student Self-Monitoring Self-Management Systems and Their Benefits**

Self-management is a process where students use tools to track their own learning and behavior throughout the instruction day. Axelrod, Zhe, Haugen, and Klein (2009) describe self-management systems as "essentially self-monitoring with an added reward component based on meeting the predetermined expectations of an external observer" (p. 326). Self-management integrates achievement motivation with a structured system of self-regulation. A student's desire

to approach success and avoid failure is (a) associated with the quality with which a student can self-regulate and (b) influences academic performance (Gut, Heckmann, Meyer, Schmid, & Grob, 2012). Motivation is thus connected to self-regulation, both of which influence a student's academic engagement and behavioral self-regulation.

Bruhn, Waller, and Hasselbring (2015) note that there are at least two types of self-monitoring or self-management systems; namely, self-monitoring of performance and self-monitoring of attention - that can positively influence student engagement. They define both, stating "self-monitoring performance involves students assessing their academic performance (i.e. number of words spelled correctly, number of problems completed), whereas self-monitoring attention involves students assessing their attention-related behaviors such as being on task or following directions" (p. 157). With the provided support from self-management tools for students with behavior needs, students are able to effectively engage in their learning.

Using self-management and self-monitoring interventions in educational settings can increase student attention to task. As Axelrod and colleagues (2009) note, "self-management interventions can be initiated to achieve quick and dramatic improvements in on-task behavior for students with impairing attention problems" (p. 329). Such self-regulation abilities are desirable to engage students in academic tasks.

Hoff and Ervin (2012) also recognize self-monitoring and self-management strategies as having demonstrated effectiveness as interventions for diminishing targeting disruptive behavior. As previously mentioned, students with identified behavioral needs benefit from using self-management intervention tools to maintain motivation. Self-management tracking systems allow students to see their progress and reflect on their behaviors in a structured and monitored

manner. Self-management has resulted in increases in homework completion, organization, on-task behaviors, academic output, and academic accuracy (Hoff & Ervin, 2012).

In classrooms, self-management tracking systems include check-in and check-out systems and student reflection tools in which students receive teacher feedback (Miller, Dufrene, Sterling, Olmi, & Bachmayer, 2014). One self-management tracking system is the *Positive Action Curriculum* (Oakes, Lane, Cox, Magrane, Jenkins, and Hankins, 2012). This system uses scripted lessons, role-plays, songs, games, activity books, and structured discussions to facilitate positive habits. Another system is the *Daily Behavior Report Card (DBRC)*, a system developed by Filter, Benedit, Horner, Todd, and Watson (2007) whereby students have morning check-ins with a mentor, behavioral feedback, afternoon check-outs with a mentor, and parent signatures. Daily check-in and check-out systems are yet another system described by Miller, Dufrene, Sterling, Olmi, & Bachmayer (2015).

Particularly appealing to the author is the *Self & Match* self-management intervention and monitoring system developed by Jamie S. Salter & Katharine Croce (2014). The system is grounded in principles of Applied Behavioral Analysis and can be implemented with an individual student, class-wide, or as part of a School-Wide Positive Behavior Intervention & Support program.

The goal and benefit of a self-management intervention is the promotion of student independence and self-determination (Dalton, Martella, & Marchand-Martella, 1999). Self-management interventions promote independence and self-determination (choice-making) by teaching students to assess their own behavior and distinguish between acceptable and unacceptable behavior.

Students, including students with disabilities, are less likely to generalize behaviors that are taught by adult-managed interventions that learned through student-involved management systems. Why? Self-management interventions place responsibility on the individual instead of an external source (i.e. teachers, related services personnel, and parents). Providing students with the ability to determine their own actions (i.e., self-determination) can allow them to directly associate their own actions as their choices. Self-management interventions allow specific behaviors to be addressed by the individuals themselves.

Self-management interventions can be used with children and adults of all levels of intellectual functioning. As previously mentioned, all individuals are able to carry perceptions of self-efficacy, and their ability to use self-management intervention tools is no different. Alberto and Troutman (2013) argue that individuals with and without disabilities can and should be taught to monitor and change their own behavior. Research has shown that a variety of individuals with disabilities have profited from self-management interventions including individuals with specific learning disabilities, Down syndrome, autism, and emotional-behavior disorders (Salter & Croce, 2014). Self-management interventions tools also benefit students without IEPs who have behavioral needs. Axelrod and colleagues (2009) demonstrated how self-management interventions can achieve swift and dramatic improvements in behaviors such as off-task behaviors for students with attention problems. Self-monitoring can improve student self-regulation of behavior with concomitant improvements in academic attention and achievement.

Self-management interventions have proven to be successful in increasing students' behavioral and classroom performance and ability to engage in the least restrictive environment of general education. As students use self-management tools, they learn to observe and record

when they have performed and achieved desired targeted behaviors (Wehmeyer, Argan, & Hughes, 1998). Self-management interventions assist students to develop academic skills such as work completion, communication skills, and social skills. By providing this support to the students, they are able to more actively participate in inclusive educational settings, the least restrictive environment desired for students. Self-monitoring tools offer students a reflective tool to remind and motivate them during instructional time, thus enabling them to engage in the general learning environment with more success.

Self-management interventions also can be highly individualized for the specific needs and target behaviors of a student. Based upon the areas of academic, behavioral, social, or self-regulatory need, the self-management tool can be customized for that individual. Referring back to the collaborative nature of self-management interventions, the tool can be adjusted at any time by all of the educational team.

### **Summary**

Achievement motivation is a key factor in the academic progress of students. High levels of motivation correlate with task completion and instructional engagement. Without motivation, students fail to value and attempt or complete a task. Task completion is tied to self-efficacy. Self-efficacy is an individual's perception of his or her ability to complete a task. Both motivation and self-efficacy perceptions influence academic achievement. For students who exhibit and experience behavioral challenges, self-management interventions and systems exist as tools to support and promote behavioral and academic growth, and increase motivation and perceptions of self-efficacy.

## **Chapter Three**

### **Methodology**

The guiding question for this project was: What is a user-friendly self-management intervention handbook for teachers that can impact student motivation and self-efficacy in order to increase academic achievement and promote independence for students with identified special needs and/or behavioral challenges? The methodology for creating this project involved extensive research and direct experience of using self-management interventions that support students with identified special needs in accessing their learning. The author examined empirical studies, curriculum resources, and various self-management behavior interventions with the purpose of determining ways in which self-management interventions can impact and develop motivation and self-efficacy for students who are introduced to the self-management tools included in the product of this project, a handbook for teachers.

### **Audience**

The primary audiences for the handbook that is the product of this project are elementary general educators, educational specialists, and related services personnel who serve students with and without IEPs whose behaviors impede their engagement with the curriculum. Secondary audiences include administrators, school board members, and family members who are interested in learning about self-management systems for helping students to monitor and change their behaviors.

### **Procedure of Handbook Development**

Once the author made the decision to make self-management interventions the focus of her master's research, she looked at the literature on inclusive education and the relationship between motivation, self-efficacy and self-management systems. As already mentioned in the

literature review, the author also decided to learn more about Covey's seven habits of highly effective people applied to children and teens by examining *The leader in me: How schools around the world are inspiring greatness, one child at a time* (Covey, Covey, Summers, & Hatch, 2017), *The 7 habits of happy kids* (Covey, 2008), and *The 7 habits of highly effective teens* (Covey, 2014).

The author's process for developing this project began with her own direct experiences with using self-management interventions within a learning center model in an inclusive school setting. She then enhanced her understanding of self-management interventions by attending professional development trainings regarding tools for modifying behavior in educational settings. The author learned through these experiences that self-management systems can be and are most often used to monitor and track changes for a wide variety of behaviors. Self-management systems have less often been used to monitor and track changes in academic performance. By self-monitoring both behavior components as well as academic components, students are able to see academic progress concomitant with improvements in behavior improves. For example, improvements in "on task" behaviors can be connected to increased academic work completion and academic success in the classroom.

Based upon these initial personal experiences, the author decided that a quick, user-friendly handbook regarding students self-managements systems would be beneficial to educators and other who work with elementary-age students who exhibit behavioral challenges associated with autism, emotional behavioral disturbance (EBD), attention deficit disorder as well as any student exhibit behaviors for which self-monitoring would be a benefit. The author aimed to create a handbook that could quickly teach educators and related service personnel how to create and modify tools to track student behavior and promote student reflection on his or her

behavior in order to promote student engagement within instruction. The author wanted the handbook to include information and tools that could be implemented in a variety of school settings, ranging from general education classrooms and specialized academic instruction settings.

The author decided that included in the handbook would be sample model forms and formats for students to reflect upon individualized questions related to personal responsibility (e.g., Did I choose my actions, attitudes, and moods? Did I plan ahead and set my goals? Was I flexible in my thinking and/or accepted a schedule change?) at designated time frames throughout the day. Illustrated in the templates and examples in the handbook, would be various time frames such as tracking by the hour, by days of the week, by subject period, by content area, or structured and unstructured times of the day. The tools and templates are then used to provide students with the opportunity to visually represent and earn recognition and rewards for completing given target learning behaviors being tracked or *lea vice versa*, can allow them to expect appropriate consequences.

The author also decided to include in the handbook a case study of using a custom-designed Self and Match for an upper elementary student with an IEP who was not engaging or participating in general education classroom activities at the beginning of the school year.

The author examined and considered self-management tools described in various empirical studies, articles, and curriculum resources, and settled upon the Salter and Croce's (2014) Self & Match system as the model for the templates that would be included in the handbook and Covey's (2008, 2014) seven habits of highly effective kids and teens as the framework for promoting student self-efficacy. The author's goal in designing the handbook is to offer educators a universally accessible self-management tool that could be used with any learner

and a simple structured data collection system for educators to motivate students and help students gain ownership for their behaviors. In summary, the overarching goal of this project is to provide educators with self-management tools and strategies that reflect Covey's 7 habits of effective kids and teens in order to increase student motivation, self-efficacy, engagement in instruction, task completion, and, ultimately, academic progress.

## Chapter Four

### Results

The handbook that is the product of this project is entitled *The Leader In Me Self-Management System Handbook for Elementary Educators*. The handbook was created in order to provide elementary educators with a user-friendly self-management intervention handbook that promotes student motivation and self-efficacy while increasing academic achievement and promoting independence for students with IEPs and/or behavioral challenges.

The handbook, which can be found in Appendix A, is comprised of four chapters. Chapter 1 of the handbook is dedicated to the overviews of Covey's 7 habits of happy kids and teens and Salter & Croce's *Self & Match* system. Each habit is designed to develop character traits such as independence, interdependence, and whole person awareness. Chapter 2 provides example templates of *The Leader In Me Self & Match* (LMSM) for each of the 7 habits. It also provides examples of a customized LMSM, in which clusters of 2-3 habits can be combined into one template. Benefits of these templates include the opportunity to individualize the LMSM for specific students, based on their need.

Chapter 3 offers a case study example of *The Leader In Me Self and Match* being customized and implemented with a student with an IEP who required support to engage in all academic settings. The chapter details how the student performed in the general education classroom prior to the implementation of the LMSM, an example of his LMSM form, and his progress after four weeks of intervention. Chapter 4 describes next steps for educators and students who use LMSM. Additional resources and professional development opportunities are listed and contact information is provided. Chapter 4 is followed by a reference page, which provides sources cited in the handbook and additional resources.

## **Chapter Five**

### **Discussion**

The purpose for this project was to successfully develop a user-friendly handbook for a self-management system that effectively increases a student's ability to access their learning across educational settings. This self-management system sought to address both the behavioral and academic challenges students may face, particularly if they have been identified with a special need and have an Individualized Education Plan. The resulting handbook, which is described in Chapter 4, was implemented with students with an identified special need who engage in behaviors that impede on their academic progress. The author found a gap in available self-management interventions that address both the academic and behavioral achievement potential of all students, in addition to its ability to bridge a self-management system with a foundational philosophy that promotes leadership and initiative within students.

After conducting extensive research regarding self-management systems, the impact of behavioral challenges impeding on academic progress, and current literature on student motivation and self-efficacy, the author created handbook to meet the specific needs of the target population. The goal of the handbook was to give teachers a self-management intervention that could successfully strengthen the motivation, independence, and leadership of students within the classroom environment so as to optimize instructional time. This handbook and accompanying self-management system can be adapted in a variety of forms to meet the specific needs of students.

### **Limitations of Project**

A limitation of this project is that the handbook produced through research has not yet been examined by educators other than the author, nor has it been peer reviewed by a panel of

experts in the field of special education. While the methods included in the handbook are research-based, the handbook itself has not yet been validated by teachers, parents, paraeducators, or outside sources and observers. Therefore, it is not yet known as to how helpful the handbook actually is when given to novice to experienced educators in order to effectively employ the self-management intervention. In other words, the author has not yet field-tested this handbook with other special or general education teachers who serve students with identified special needs whose behavior impedes on their learning.

Another limitation of this project is that the handbook produced derived from the personal professional experiences of the author, and her familiarity with both the *Self and Match* system and Covey's 2014 *The leader in me: How schools around the world are inspiring greatness, one child at a time*. School personnel who are not familiar with either or both will need to acquire knowledge of these theoretical foundations and strategies in order to effectively relate to and implement this self-management system.

### **Lessons Learned and Educational Implications**

The main lesson the author learned in creating this handbook was the role that motivation and self-efficacy plays in the classroom and its impact on each individual student's ability to self-manage their behaviors and academic progress. These foundational skills and character traits are essential for students to develop into a contributing member of society. Particularly for students with identified special needs, motivation positively influences students' ability to progress and performance in the least restrictive environment and engage in inclusive educational settings within school. As a result of the review of the research literature and current self-management systems, the author was convinced that self-management interventions and

systems should be included as a formal protocol and procedure for all educators to learn about and use.

Another lesson the author learned while developing this handbook and accompanying self-management system was the importance of individualizing appropriate supports to allow students of all ages and ability levels to access their learning. With a deep understanding of each student, educators are able to implement the most effective support systems and interventions as well as incorporate motivating factors specific for the students.

### **Next Steps**

A next step for the author is to implement the handbook and the self-management intervention within the classroom to determine what works for each student and to adjust and customize the templates to meet the specific needs of students. The author has found that giving students a motivational platform, students can and do take the opportunities to take charge of their learning and educational experiences. The author would like to continue to create customized templates to meet a wide range of individualized student needs and then share these with other educators for their use.

Another step is to put this handbook in the hands of special and general educators to test its usefulness and effectiveness of The Leader In Me Self and Match system as a self-management system for students whose behavior impedes access to academic content.

### **Summary**

Optimism is the faith that leads to achievement.

Nothing can be done without hope and confidence.

Helen Keller

By evaluating research on theoretical foundations associated with student motivation, self-efficacy, and self-management systems, the author created a handbook in a state of *optimism* and *faith* that the tools and the handbook that is the product of this project will help educators to support students to *achieve* by successfully using self-management system with students who have identified special needs and whose behaviors impede their academic progress. This project was developed with the *hope* that students with special needs in mind would be better able to access their education in the least restrictive environment of general education. This project was also developed to develop educators' *confidence* in making inclusive education a professional priority so that all students are able to develop skills that will allow them to reach their greatest potential.

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## **Appendix A**

### **The Leader in Me Self-Management System Handbook for Elementary Educators**

The Leader In Me  
Self-Management System  
Handbook for Elementary Educators

by  
Xy-Za Antaran

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## **Introduction**

Each morning, the wave of students arriving to school is a routine sight for all teachers. As student after student passes by, teachers greet some students by name and begin that child's day on a positive start. In a perfect world, every teacher not only would know each individual student's name, but also their strengths, abilities, uniqueness, and needs.

### **Setting the Context: Creating Inclusive Classrooms**

Hold this opening morning image and further picture a learning environment that focuses upon *each* student succeeding both academically and behaviorally, teachers continually inventing and adjusting ways to engage students in their learning each day, and personalized tools being used to track student progress. Such a learning environment could be called an inclusive classroom, which practices the vision of “welcoming, valuing, empowering, and supporting the academic, social/emotional, and language and communication learning of all students in shared environments and experiences” (Villa & Thousand, 2017, p. 12). In inclusive classrooms and schools, educators attend to the fostering of meaningful and individualized relationships with and among students, supporting development of students' sense of identity, and opportunities to access academic content in a modified or accommodating manner.

### **For Whom is This Handbook Useful?**

This handbook is useful for elementary educators in both the general education and special education realm. This handbook can be used school wide as a structured intervention that bridges the 7 habits into the support systems for the students, allowing for teachers and administrators alike to individualize a self-management system for specific students.

### **What Is Included in This Handbook?**

In this handbook, *The Leader In Me Self Management System Handbook for Elementary Educators*, you will become familiarized with self-management tools that allows students who need support to identify and engage in *good*

*learner behaviors* that allow them to engage and succeed in inclusive learning communities. The handbook draws upon the philosophy and principles behind *The 7 Habits of Happy Kids* (Covey, 2008) and *The 7 Habits of Highly Effective Teens* (Covey, 2014) popular texts. The handbook provides educators with motivational strategies and self-monitoring “Self and Match” tools and templates that teach and support students to self-monitor and ultimately learn to self regulate their *good learner behaviors*. The strategies and tools and templates included in the handbook are inspired by Salter and Croce’s (2014) *The self & match system: Systematic use of self-monitoring as a behavioral intervention* text for promoting student motivation, independent, and self-control through collaborative planning, goal setting and assessment with their teachers.

This handbook consists of 4 chapters that focus on developing healthy learning and behavioral habits. Chapter 1 will introduce the 7 habits of happy kids and teens as a behavioral support foundation in classrooms and schools. Chapter 2 will introduce The Leader In Me Self and Match self-management system and provide templates for each of the 7 habits. Chapter 3 will detail a case study of a student who has benefited from the LMSM, and will follow his journey towards motivation and independence. Chapter 4 will discuss next steps for the LMSM and what it meets for all schools.

This handbook began as a means of promoting the implementation of Inclusive Education within classrooms as well as increasing the value of the educational experience of all types of learners, particularly students with identified special needs who require supports to access their full academic potential. In the Find in the References inspirations for this project, in particular Covey’s (2008) *The 7 Habits of Happy Kids* and Salter and Croce’s (2014) *The Self & Match System: Systematic Use of Self-Monitoring as a Behavioral intervention*.

## Chapter 1

### What are the 7 Habits?

	<p>Habit 1</p> <p>Be Proactive</p>	<p>I am a responsible person. I take initiative. I choose my actions, attitudes, and moods. I do not blame others for my mistakes. I can only be offended if I choose to be.</p>
	<p>Habit 2</p> <p>Begin With the End in Mind</p>	<p>I plan ahead and set goals. I do things that have meaning and make a difference. I am an important part of my classroom and contribute to my school's mission and vision, and look for ways to be a good citizen.</p>
	<p>Habit 3</p> <p>Put First Things First</p>	<p>I spend time on things that are most important. This means I say no to things I know I should not do. I set priorities, make a schedule, and follow my plan. I am disciplined and organized.</p>
	<p>Habit 4</p> <p>Think Win-Win</p>	<p>I balance courage for getting what I want with consideration for what others want. I make deposits in others' Emotional Bank Accounts. When conflicts arise, I look for options that work for both sides.</p>
	<p>Habit 5</p> <p>Seek First to Understand, Then to be Understood</p>	<p>I listen to other people's ideas and feelings. I try to see things from their viewpoints. I listen to others without interrupting. I am confident in voicing my ideas. I look people in the eye when talking.</p>
	<p>Habit 6</p> <p>Synergize</p>	<p>I value other people's strengths and learn from them. I get along well with others, even people who are different than me. I work well in groups. I seek out other people's ideas to solve problems because I know that by teaming with others we can create better solutions than any one of us along. I am humble.</p>
	<p>Habit 7</p> <p>Sharpen the Saw</p>	<p>I take care of my body by eating right, exercising, and getting sleep. I spend time with family and friends. I learn in lots of ways and lots of places, not just at school. I take time to find meaningful ways to help others.</p>

Inspired by *Leader In Me* by Stephen R. Covey, Sean Covey, Muriel Summers, and David K. Hatch (2014).

Each Habit focuses on a character trait that promotes leadership in students. The first three Habits (Be Proactive, Begin with the End in Mind, and Put First Things First) focus on the character development of independence. Such actions and skills associated with these habits include goal setting, planning, time management, organization, initiative, responsibility, vision, and integrity. Habits 4 – 6 (Think Win-Win; Seek First to Understand, Then to be Understood; and Synergize) all promote the character development of interdependence, teamwork, and collaboration. Actions and skills associated with these habits consist of conflict management, listening/empathy, speaking skills, problem solving, respect, ethics/manners, honesty, openness, and valuing diversity. Lastly, the 7<sup>th</sup> Habit, Sharpen the Saw, focuses on the individual as a whole and developing introspective balance, involving actions and skills associated with physical wellness, social skills, mental skills, emotional stability, contribution/meaning, desire to learn, and fun.

#### **What is the *Self and Match System*?**

*Self and Match* is a self-monitoring intervention and motivational system grounded in theory and research. It is a “valuable tool that can be implemented with an individual student, class-wide, or as part of a School-wide Positive Behavior Intervention & Support program” (Salter & Croce, 2014, p. 2). There are four fundamental steps in which educators must engage to effectively use this system:

1. Plan systematically before beginning an intervention
2. Set a student’s criteria for earning a reward at an attainable level
3. Linking function of a behavior to menu of rewards leads to a higher rate of success
4. Change intervention as student behavior changes

Benefits of using the *Self and Match* system are numerous. For students, use of the system affords them opportunities for a) perspective taking, b) taking an active role in ‘owning’ their choices, c) honest and positive

interactions with teachers, d) learning to accept ‘No’, e) receiving clear expectations and visual cues, f) learning to aim for progress rather than perfection, and g) to reflect on examples and non-examples of behaviors and habits. For teachers and other educators, the LMSM offers a) an intervention tool that can be customized to meet a student’s specific needs, b) regular opportunities for collaborating with students and colleagues, c) the tool to supplement existing classroom management strategies, d) an intervention that decreases the amount of time spent on correcting behavior and increased time for instruction, and e) an easy data collection system for monitoring student progress and for reporting on progress toward IEP goals.

By blending the fundamentals of *The Leader In Me* philosophy with the structure of *Self and Match* system, the LMSM offers students and teachers reflective questions in the template format that are directly connected to the seven habit forwarded in the well known and well respected Covey writings. By using *The Leader In Me* as a guide, teachers also are able to forward a seven habit school-wide philosophy and match is with a self-management behavior intervention that reinforces the seven habit character development philosophy. Students who require support to transform their behavioral challenges into productive learner behavior that allows access to academic content are provided the opportunity to develop independence, collaboration, and reflective thinking within an inclusive school setting.

## Chapter 2

### The Leader In Me Self & Match Templates for the 7 Habits

In this chapter, you will become familiarized with *The Leader In Me Self and Match* (LMSM) forms for each of the 7 habits. Each form is designed for students to focus on one particular habit, consisting of reflective questions as directly related to the Habit. When choosing which LMSM form to use, consider how the student is currently performing, and what character traits and leadership skills might be beneficial for them to focus on and develop:

#### Independence: Habits 1 – 3

<b>Habit 1: Be Proactive</b>	<b>Habit 2: Begin with the End in Mind</b>	<b>Habit 3: Put First Things First</b>
<ul style="list-style-type: none"> <li>• Begin task/on task behavior</li> <li>• Taking responsibility and ownership of behavior</li> </ul>	<ul style="list-style-type: none"> <li>• Time-management skills</li> <li>• Planning and creating routine</li> <li>• Goal setting</li> <li>• Preparedness and organization</li> </ul>	<ul style="list-style-type: none"> <li>• Task completion</li> <li>• Prioritizing and sticking to a plan</li> <li>• Requesting a separate setting to focus</li> <li>• Integrity</li> </ul>

#### Interdependence: Habits 4 – 6

<b>Habit 4: Think Win-Win</b>	<b>Habit 5: Seek First to Understand, then to be Understood</b>	<b>Habit 6: Synergize</b>
<ul style="list-style-type: none"> <li>• Positive peer and adult interaction</li> <li>• Perspective-taking</li> <li>• Problem solving skills</li> </ul>	<ul style="list-style-type: none"> <li>• Flexible thinking/accepting of schedule changes</li> <li>• Active listening skills (i.e. eyes on board, nods, etc.)</li> <li>• Open-mindedness</li> </ul>	<ul style="list-style-type: none"> <li>• Collaboration and teamwork skills</li> <li>• Perspective taking</li> <li>• Open-mindedness</li> <li>• Valuing others</li> </ul>

#### The Whole Person: Habit 7

<b>Habit 7: Sharpen the Saw</b>
<ul style="list-style-type: none"> <li>• Request a break (i.e. taking a walk, using a sensory tool)</li> <li>• Utilizing coping strategies (deep breaths, processing with an adult, etc.)</li> <li>• Taking care of body by eating and sleeping right</li> <li>• Taking care of others</li> </ul>

### **How do I Use the LMSM form?**

**Step 1:** At the beginning of the day, student will independently select the reward she is working towards. Once chosen, the student will write it at the bottom of their LMSM form.

**Step 2:** At the end of each designated time period, student answers all questions independently and then the teacher answers all questions independently.

**Step 3:** Teacher and student will compare answers and identify all “Matches”.

**Step 4:** Student receives 2 points for each “YES Match” and 1 point for each “NO Match”.

**Step 5:** Students receive 0 points for mismatches (Yes/No or No/Yes). When mismatches occur, teachers can use this opportunity as a time to reflect on student performance, provide feedback, and/or redirect students.

**Step 6:** Calculate the percentage. Divide the number of points earned by the number of points possible.

**Step 7:** Student receives their reward at a predetermined time (i.e. end of the day) based on the percentage of points earned.

### **How do I Use the Data Collection sheet?**

**Step 1:** Calculate the Student percentage for each of the Goals. Divide the amount of YES’s over the total possible points in the column.

**Step 2:** Calculate the Teacher percentage for each of the Goals. Divide the amount of YES’s over the total possible points in the column.

**Step 3:** Consistently document into the Data Collection sheet at the end of each day.

**Step 4:** Use the Data Collection sheet to interpret and track progress of the behaviors and developing character traits

**Step 5:** For students with Individualized Education Plans, use the data to create, track, and implement IEP goals.

\_\_\_\_\_’s Leader in Me Self and Match Form  
**Habit #1: Be Proactive**  
 You’re in charge!

	If <b>SHs</b> :	If Teacher Says:	# of Points Earned!
<b>a</b>	Yes	Yes	2
	No	No	1
<b>b</b>	Yes	No	0

Date: _____	Did I choose my actions, attitudes, and moods?		Did I start a task independently and complete it by the due date?		Did I advocate for myself when I felt overwhelmed?		Number of Points		
	Student	Teacher	Student	Teacher	Student	Teacher	Yes Match	No Match	Total
Morning Routine	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Reading	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Recess	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Writing	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Math	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Lunch	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Social Studies	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Closure Routine	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
<b>Total</b>									

I need to earn 80% of my goal to earn my reward.

The reward I am working for: \_\_\_\_\_

I earned \_\_\_\_\_%. I DID or DID NOT earn my reward.

**'s Leader in Me Self and Match Form**  
**Habit #2: Begin with the end in mind**

Have a plan!

If Says:	If Teacher Says:	# of Points Earned!
Yes	Yes	2
No	No	1
Yes	No	0

Date: _____	Did I plan ahead and set my goals?		Did I have my materials ready for the lesson?		Did I do things that have meaning and make a difference?		Number of Points		
	Student	Teacher	Student	Teacher	Student	Teacher	Yes Match	No Match	Total
Morning Routine	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Reading	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Recess	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Writing	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Math	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Lunch	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Social Studies	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Closure Routine	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
<b>Total</b>									

I need to earn 80% of my goal to earn my reward.

The reward I am working for: \_\_\_\_\_

I earned \_\_\_\_\_%. I DID or DID NOT earn my reward.

\_\_\_\_\_’s Leader in Me Self and Match Form  
**Habit #3: Put first things first**  
 Work first, then play

If Says:	If Teacher Says:	# of Points Earned!
Yes	Yes	2
No	No	1
Yes	No	0

Date: _____	Did I make a schedule and stick to my plan?		Did I spend my time on things that are most important?		Did I stay focused during the lesson by working where I learn best or by using a fidget to reduce distractions?		Number of Points		
	Student	Teacher	Student	Teacher	Student	Teacher	Yes Match	No Match	Total
Morning Routine	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Reading	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Recess	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Writing	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Math	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Lunch	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Social Studies	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Closure Routine	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
<b>Total</b>									

I need to earn 80% of my goal to earn my reward.

The reward I am working for: \_\_\_\_\_

I earned \_\_\_\_\_%. I DID or DID NOT earn my reward.

\_\_\_\_\_’s Leader in Me Self and Match Form

**Habit #4: Think Win-Win**  
Everyone can win!

If Says:	If Teacher Says:	# of Points Earned!
Yes	Yes	2
No	No	1
Yes	No	0

Date: _____	Did I collaborate with others and work together to complete a task?		Did I consider the other person’s point of view?		Did I compromise and find new solutions with others to solve problems?		Number of Points		
	Student	Teacher	Student	Teacher	Student	Teacher	Yes Match	No Match	Total
Morning Routine	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Reading	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Recess	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Writing	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Math	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Lunch	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Social Studies	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Closure Routine	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
<b>Total</b>									

I need to earn 80% of my goal to earn my reward.

The reward I am working for: \_\_\_\_\_

I earned \_\_\_\_\_%. I DID or DID NOT earn my reward.

\_\_\_\_\_’s Leader in Me Self and Match Form

**Habit #5: Seek first to understand, then to be understood**  
Listen before you talk

If Says:	If Teacher Says:	# of Points Earned!
Yes	Yes	2
No	No	1
Yes	No	0

Date: _____	Did I listen first to other ideas, opinions, and feelings without interrupting?		Was I flexible in my thinking and/or accepted a schedule change?		Did I listen actively by looking at the speaker in the eye, nodding, and participating in the conversation?		Number of Points		
	Student	Teacher	Student	Teacher	Student	Teacher	Yes Match	No Match	Total
Morning Routine	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Reading	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Recess	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Writing	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Math	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Lunch	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Social Studies	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Closure Routine	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
<b>Total</b>									

I need to earn 80% of my goal to earn my reward.

The reward I am working for: \_\_\_\_\_

I earned \_\_\_\_\_%. I DID or DID NOT earn my reward.

\_\_\_\_\_’s Leader in Me Self and Match Form

**Habit #6: Synergize**  
Better together!

If ___ Says:	If Teacher Says:	# of Points Earned!
Yes	Yes	2
No	No	1
Yes	No	0

Date: _____	Did I work in groups to help create better ideas that one person cannot do alone?		Did I value the strengths of others and allow myself to learn from them?		Did I raise my hand and wait to speak and ask questions when I am not clear on the instructions or expectations?		Number of Points		
	Student	Teacher	Student	Teacher	Student	Teacher	Yes Match	No Match	Total
Morning Routine	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Reading	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Recess	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Writing	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Math	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Lunch	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Social Studies	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
Closure Routine	Yes	Yes	Yes	Yes	Yes	Yes			
	No	No	No	No	No	No			
<b>Total</b>									

I need to earn 80% of my goal to earn my reward.

The reward I am working for: \_\_\_\_\_

I earned \_\_\_\_\_%. I DID or DID NOT earn my reward.

\_\_\_\_\_’s Leader in Me Self and Match Form

**Habit #7: Sharpen the saw**

Balance feels better

If _____ Says:	If Teacher Says:	# of Points Earned!
Yes	Yes	2
No	No	1
Yes	No	0

Date: _____	Did I request a break (i.e. use a fidget, take a walk, etc.)?		Did I take care of my body by eating right, exercising, and getting sleep?		Did I take time to help others and point out how it makes me feel?		Number of Points		
	Student	Teacher	Student	Teacher	Student	Teacher	Yes Match	No Match	Total
Morning Routine	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Reading	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Recess	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Writing	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Math	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Lunch	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Social Studies	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Closure Routine	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
<b>Total</b>									

I need to earn 80% of my goal to earn my reward.

The reward I am working for: \_\_\_\_\_

I earned \_\_\_\_\_%. I DID or DID NOT earn my reward.

To further individualize the forms, below is an example of customizing by combining two Habits on one form. Rather than a daily form, the author decided to create a weekly form to address the Math portion of the student's day.

\_\_\_\_\_’s **Leader in Me Self and Match Form**  
**Habit #2 and Habit #4**

If _____ says:	If Teacher Says:	# of Points Earned!
Yes	Yes	2
No	No	1
Yes	No	0

Week of: _____ <b>Math Instruction</b>	<i>Did I begin with the end in mind?</i>			<i>Did I think win-win?</i>			Number of Points		
	<input type="checkbox"/> Plan ahead and stick to it!	R E M I N D E R S		<input type="checkbox"/> Think positive! You can do it!	R E M I N D E R S				
<input type="checkbox"/> Stay focused during lessons	<input type="checkbox"/> Work with a team to complete tasks								
	<input type="checkbox"/> Pencil, paper, and materials ready			<input type="checkbox"/> Find new solutions to overcome obstacles			Yes Match	No Match	Total
Monday	Student	Teacher		Student	Teacher				
	Yes	Yes		Yes	Yes				
Tuesday	No	No		No	No				
	Yes	Yes		Yes	Yes				
Wednesday	No	No		No	No				
	Yes	Yes		Yes	Yes				
Thursday	No	No		No	No				
	Yes	Yes		Yes	Yes				
Friday	No	No		No	No				
	Yes	Yes		Yes	Yes				
Total									

I need to earn 80% of my goal to earn my reward.

The reward I am working for: \_\_\_\_\_

I earned \_\_\_\_\_%. I DID or DID NOT earn my reward.

Student: \_\_\_\_\_ Month: \_\_\_\_\_

### Leader In Me Self and Match Data Collection Sheet

	Goal 1		Goal 2		Goal 3	
____ to ____	Student	Teacher	Student	Teacher	Student	Teacher
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
____ to ____						
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
____ to ____						
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
____ to ____						
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
____ to ____						
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						

## Chapter 3

### Luke's Journey: A Case Study

Meet Luke! Luke is a 5<sup>th</sup> grade student in an inclusive classroom, in which he receives support from the specialized academic instructor and his general education teacher simultaneously throughout his school day. Luke is a student with an identified special need and has an Individualized Education Plan. He is also an English Language Learner, with his primary language being Spanish. In previous years, Luke has demonstrated a variety of behavioral challenges that impede on his ability to access academic content. His journey with *The Leader In Me Self and Match* (LMSM) has showcased an increase in that ability to access academic content in terms of his motivation and independence with academic tasks.

Academically, Luke is currently below grade level across content areas. In English Language Arts, Luke is currently reading at a 3<sup>rd</sup> to 4<sup>th</sup> grade level. He participates in his small reading group with prompting to share what he knows. He is working on a variety of writing compositions, requiring a teacher led pre-writing activity, a graphic organizer, and the ability to dictate his knowledge and ideas in a speech to text program on his classroom device. In math, Luke is working at a 2<sup>nd</sup> grade level and has difficulty engaging in lessons and turning in completed work. Luke benefits from the use of manipulatives such as base ten blocks and requires prompting from the teacher to increase his participation.

In previous school years, Luke has demonstrated behavioral challenges that impede on his academic progress. He demonstrates non-compliance by sitting quietly at his desk and day dreaming, looking around the classroom, and avoiding adult interaction and feedback. His non-preferred tasks include writing and math. He relies solely on copying from the board, and when teachers release students into independent work, Luke does not begin his tasks on his own. He

is also very rigid in his schedule where transitioning between new tasks and schedule changes are a challenge. He has difficulty using coping strategies and expressing his thoughts and feelings when he is frustrated or is engaging in task avoidance. Data shows that Luke was able to express his feelings to an adult 2-4 times per day out of 5 teaching days where he used a coping strategy appropriately 1 time. He cried after he did not earn all of his stamps, and responded after processing with an adult to get back on task. On this day, Luke was able to return to an abandoned activity after 10 minutes for 2 out of 3 instances. His behavioral supports were generalized to the entire class, with an unstructured and randomized reward system a few times a month.

The LMSM system was implemented with Luke to increase his motivation and independence within academic tasks and to increase his behavioral achievement. His LMSM template, a sample of which is shown on page 23, is customized to meet his needs. As you see, his template combining two Habits, *Habit #3: Put First Things First* and *Habit #5: Seek First to Understand, Then to Be Understood*. The decision to customize his template to include these two particular habits for his reflective questions was made because of observations that indicated that Luke was having difficulty initiating and completing tasks as well collaborating and cooperating in adult-directed interactions.

With the implementation of the LMSM, Luke demonstrated increased engagement in academics. He is more responsive to teacher prompts. He has with fewer instances of task avoidance and non-compliance. Luke is able to transition between tasks and academic subjects quickly. Luke is involved in choosing his reward, further motivating him to achieve academically and behaviorally. After four weeks of intervention, Luke was able to put first things first 89% of the time and to seek first to understand, then to be understood 90% of the time. Luke has thrived with this unique self-monitoring system and it is evident with his change in attitude towards non-preferred tasks and in his response to teacher prompts.

## Chapter 4

### What's Next?

*Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence.*

*Helen Keller*

What's next for the teachers and students who use The Leader In Me Self and Match system?

- Leave a legacy and be the difference!
  - Share and conduct a book study for *The Leader In Me* by Covey
  - Attend a *Leader In Me* event. Contact a representative and find events at [LeaderInMe.org](http://LeaderInMe.org)
- Set a strong foundation!
  - Attend a *Self and Match* training or workshop, purchase the manual for “The Self & Match System: Systematic Use of Self-Monitoring as a Behavioral Intervention”, and request individual consultation. Contact Jamie S. Salter and Katharine Croce at [selfandmatch@gmail.com](mailto:selfandmatch@gmail.com)

The purpose of this handbook was to provide a user-friendly resource for educators when implementing the Leader In Me Self and Match system. The author's hope is that, with the help of the tools presented in this handbook educators will be more empowered to promote leadership in students. With increased self-management skills and independence, students will stay motivated and engaged in their learning, thus acquiring essential life skills for their future.

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