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COPAA **SEAT 3.0**

The Business of Special Education Advocacy

The Business of Special Education Advocacy - SEAT 3.0

Instructors:

Course Description: This is a class for Special Education Advocates who are starting a non-profit or for-profit advocacy business. The focus is on the practical issues of business formation (starting and operating), not on the specifics of special education advocacy. The class is designed for students who have successfully completed the SEAT 2.0 curriculum (or have experience/training as an advocate) and now want to start working professionally with students and families. The curriculum draws on the experience of advocates who have started their own for-profit or non-profit business, and reviews the challenges, concerns, and solutions that they developed. The class addresses business issues generally, as the laws that impact business operations differ among localities. Included are business development and marketing strategies unique to advocates.

Required:
The Small Business Start-up Kit A Step-by-Step Legal Guide, Peri H. Pakroo, J.D., 10th Edition (2018)

Recommended:
Special Needs Advocacy Resource Book, Rich Weinfeld & Michelle Davis, (2008)
Starting and Building a Nonprofit a Practical Guide, Peri H. Parkroo, J.D., 7th Edition (March 2017)

WEEK 1: So, You Want to Start a Special Education Advocacy Business?

Date: September 13, 2018 · 12:30 – 2:30 PM Eastern/ 9:30 -11:30 AM Pacific

Assignment BEFORE CLASS: By September 10 upload a short video (30 to 60 seconds) called "Hire ME" on the COPAA community page for SEAT 3.0. In this short video should describes who you are and why someone should hire you as a special education advocate. (This is an exercise is learning to market your skills and expertise).

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Materials to Review Before Class:
Pakroo, Introduction and Chapters 4, 16

"Cash Flow – How it Works to Keep Your Business Afloat",
https://www.thebalancesmb.com/cash-flow-how-it-works-to-keep-your-business-afloat-398180

22 Low-Budget Marketing Ideas for Small Businesses,
https://www.wordstream.com/blog/ws/2014/10/01/marketing-ideas-for-small-businesses

Learning goals:
1. Students will discuss the concerns/challenges of becoming a paid special education advocate
2. Students will become familiar with different services paid advocates can/might provide and investigate their local market/community resources.
3. Students will become familiar some business basics in running a small business – including administration, finance, product development, management and marketing.
4. Students will become familiar with (and start to create) a basic business plan to plan for their advocacy business.
5. Students will become aware of when to seek professional legal and financial support for helping running their small business.

Homework:

Review basic business plan templates below. You can choose any template you like but through the class you will be completing the business plan for your small business: Here are the business plans:

https://www.businessnewsdaily.com/5067-free-business-templates-word-pdf.html

Fill in sections on products (however you see those products) that you will be offering as a special education advocate in your small business. In addition, research what services are being offered in the area/market/community you plan to operate in, and document how you see your services fitting in.

WEEK 2: Starting and Running a Special Education Advocacy Business.

Date: September 20, 2018 · 12:30 – 2:30 PM Eastern/ 9:30 -11:30 AM Pacific

Learning goals:

1. Students will learn about legal structures for businesses.
2. Students will understand the differences between for-profit (including sliding scale and pro bono) and non-profit organizations and their funding models
3. Students will understand some the implications of doing business in their state and locality and the issues that they will need to investigate (e.g., zoning/location, business licenses, insurance, taxes)

Materials to Review Before Class:

Pakroo Chapters 1, 6, 7, 8, 9, 10, 13

Nonprofit or for profit Difference – http://www.keydifferences.com/difference-between-non-profit-and-not-for-profit-organization.html

Understanding Fee for Service Nonprofit Models: http://strengtheningnonprofits.org/resources/Guidebooks/Understanding_Fee-for-service_Models.pdf

Recommended for those interested in Nonprofits:
"Budgeting for NonProfits" https://www.councilofnonprofits.org/tools-resources/budgeting-nonprofits

Homework:
Using your business plan template from https://www.businessnewsdaily.com/5067-free-business-templates-word-pdf.html Research your local start up costs (place of business, licenses, insurance etc) Fill in sections on business structure and financial plan (including how you will determine your fees (DUE TO ANTI-TRUST CONCERNS PLEASE DON'T SHARE YOUR FEE AMOUNTS) and some basic cash flow projections for your business) This means that you will need to gather information from local sources such as the city/county/state you plan to operate within, Chamber of Commerce, Small Business Administration etc.

WEEK 3: Process and Procedures of Your Special Education Advocacy Business

Date: September 27, 2018 · 12:30 – 2:30 PM Eastern/ 9:30 -11:30 AM Pacific

Learning Goals

1. Students will understand the importance of ‘getting the word out’ about their business (using websites, word of mouth [endorsements], presentations, business cards, etc.).
2. Students will become familiar with building a network with other service providers (e.g., pediatricians, psychologists, social workers, counselors, etc.).
3. Students will understand the importance of creating processes and procedures for their business. This include client information - creating, maintaining and disposing of client files (intake processes (free consultations), confidentiality policies, advocacy agreement, permission to exchange information, client documents, case summaries and notes). This also includes financial records (billing forms, work records, business expenditures, cash inflow and outflow, tax reporting and payment (990 reporting for nonprofits), grant reporting/data records (nonprofits)).

Materials to Review Before Class
Pakroo, Chapters 3,5,9,11,12
skills/https://www.honeybook.com/risingtide/why-i-believe-in-community-over-competition/
https://business.tutsplus.com/tutorials/professional-networking--cms-26929
D. W’s Advocate Starter pack
https://blogs.constantcontact.com/market-your-small-business/
https://www.sba.gov/sites/default/files/files/PARTICIPANT_GUIDE_RECORD_KEEPING.pdf

Class Activity:
Reviewing samples copies of documents. Participants are encouraged to post copies that you want to share on the SEAT 3.0 group page.

Homework:
Using your business template, create your marketing plan (with cost estimates for your small business) as well as your planned place of business.

WEEK 4: Providing excellent service while keeping strong boundaries and building clear expectations

Date: October 04, 2018 · 12:30 – 2:30 PM Eastern/ 9:30 -11:30 AM Pacific

Learning Goals:
1. Advocates will learn some basic principles around providing excellent service to families.
2. Students will understand procedures for gaining and maintaining clients (e.g., use of packets of materials, profiles, outreach documents, parent testimonials, reputation)

3. Students will discuss ways of creating and maintaining healthy and boundaries with clients.
4. Students will discuss ways of creating and maintaining clear expectations of the services an advocate provides and the skill set of the advocate.
5. Students will think about when to close/refer a case and their process for doing so.

Materials to Be Reviewed Before Class:
Pakroo, Chapters 4, 10, 12
https://www.helpscout.net/blog/customer-service-
https://psychcentral.com/blog/7-tips-for-setting-boundaries-at-work/
https://www.business.org/marketing/account-management/tips-successfully-setting-realistic-expectations-clients/

Homework:
"Manage Your Time" – fill our a chart (number of Clients, estimate amount of time for each case, time spent for administrative/office work to estimate the case load that you can hold).

WEEK 5: Everything We Didn't Cover in Weeks 1 through 4

Date: October 11, 2018 · 12:30 – 2:30 PM Eastern/ 9:30 -11:30 AM Pacific

Learning Goals:
1. Students will understand the issues regarding educational rights and who holds them (divorce, co-parenting, kin care arrangements, foster parents).
2. Student will consider where their business will be run from – including the challenges of working at home (e.g., distractions/being productive) versus the space, cost of office space, dedicated business line (cell), business e-mail address, etc.).
3. Student will comprehend the significance of maintaining relationships with school districts.
4. Students will understand the costs and benefits of advocating in their own local school districts.

Materials to Be Reviewed Before Class:
https://www.lawyers.com/legal-info/family-law/divorce/making-school-decisions-for-the-children-post-divorce.html
https://www.understood.org/en/school-learning/your-childs-rights/dispute-resolution/the-difference-between-special-education-advocates-and-attorneys