

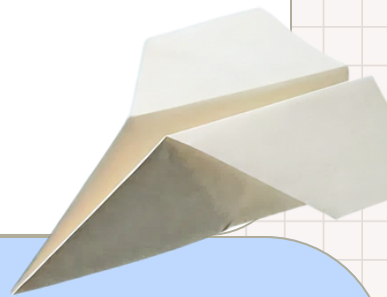


THE NATIONAL ASSOCIATION OF  
SPECIAL EDUCATION TEACHERS (NASET)



CERTIFICATION HANDBOOK

**Board Certification in Advocacy in  
Special Education  
(BCASE) Business Certificate  
15 study hour credits**



*Receive a digital certificate and a hard copy  
certificate upon completion*

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### **Unit 1—Creating a Business Plan as a Special Education Advocate**

Creating a business plan as a special education advocate requires careful consideration of various aspects, including your target market, services offered, marketing strategies, financial projections, and operational details. A business plan is important for several reasons, especially for special education advocates at various stages of development. Unit 1 will focus on how to create a business plan as a special education advocate. Topics covered include:

- Executive Summary
- Business Description
- Market Analysis
- Services Offered
- Marketing and Client Acquisition
- Competitive Analysis
- Operational Plan
- Risk Management
- Pricing and Billing/Creating a Budget
- Financial Projections
- Funding Requirements
- Growth Strategies
- Legal Considerations
- Conclusion

Unit 1 will end with a walk through, step-by-step, actual example of a business plan designed for a special education advocate

### **Unit 2—Choosing a Legal Structure for Your Business as a Special Education Advocate**

Deciding on the legal structure of your business as a special education advocate is essential. Common options include establishing a sole proprietorship, a partnership, or setting up a professional corporation (PC). Each structure has different legal and tax implications. This unit will address:

- Sole Proprietorship—Key characteristics, advantages, and disadvantages
- Partnership—Key characteristics, advantages, and disadvantages
  1. General Partnership (GP)
  2. Limited Partnership (LP)
  3. Limited Liability Partnership (LLP)
- Professional Corporation —Key characteristics, advantages and disadvantages

### **Unit 3—Client Intake and Initial Meeting with Parents as a Special Education Advocate**

"Client intake" refers to the process through which a special education advocate gathers information from potential clients at the beginning of representation. This initial step is crucial for establishing a strong working relationship and understanding the details of the client's needs. This Unit 3 will focus on the client intake and explain:

1. Initial Contact by the Client
2. Obtain Basic Information
3. Understand the Nature of the Issue
4. Determine Any Conflicts of Interest
5. Set Up an Initial Consultation with the Client
6. Documentation Review
7. Determine Special Education Eligibility
8. Write an Engagement Letter or Agreement
9. Gather More Detailed Information
10. Strategy Development
11. Communication with the School District
12. Provide Ongoing Updates

Unit 3 will then provide you with an actual Client Intake Form specific to special education advocates. We conclude Unit 3 with a discussion on making a good first impression as a special education advocate, as this is crucial in building positive relationships with students, their families, school staff, and other stakeholders.

#### **Unit 4—Billing and Payment for Services as a Special Education Advocate**

Billing as a special education advocate refers to the process of charging clients for professional services provided. Special education advocates typically charge for their time and expertise based on various billing methods and structures. It's important to have clear payment arrangements with your clients and to communicate your fees and billing practices upfront. Having a well-defined payment agreement helps avoid misunderstandings and disputes down the line. Unit 4 will begin with coverage of:

##### **A. Types of Billing**

- Hourly Billing
- Flat Fee Billing
- Contingency Fee (Why it cannot be used)
- Retainer Fee
- Retainer Plus Hourly Billing
- Hybrid Models
- Pro Bono

When clients don't pay their fees, it can create challenges for special education advocates.

This second part of Unit 4 part will focus on:

##### **B. Non-Payment by Clients and Options for Managing the Situation**

- Communication
- Invoice Dispute Resolution
- Late Payment Penalties
- Payment Plans
- Cease Work
- Small Claims Court
- Collection Agencies
- Alternative Dispute Resolution
- Legal Action

### **Unit 5—Networking and Marketing as a Special Education Advocate**

Networking and marketing are essential aspects of any profession, including being a special education advocate. Building a strong professional network can benefit advocates in various ways, such as gaining referrals, staying updated on special education developments, and expanding a client base. Networking involves building relationships and connections, while marketing involves promoting and selling products, services, or ideas. The two concepts work together to create opportunities and facilitate growth within professional and business contexts. This unit will focus on how special education advocates can effectively network and market their services. Unit 5 coverage includes:

1. Attend Special Education-Related Events
2. Build a Social Media and Online Presence
3. Referral Networks
4. Mentorship and Mentoring
5. Community Involvement
6. Speaking Engagements
7. Social Media Presence
8. Civic and Political Involvement
9. Professional Organizations
10. Maintain Relationships
11. Client Relationships
12. Client Reviews and Testimonials
13. Offer Free Workshops or Webinars
14. Community Involvement
15. Email Marketing
16. Pay-Per-Click Advertising
17. Offer Initial Consultations

Unit 5 will then conclude by providing you with an actual marketing plan for a special education advocate based on the networking opportunities addressed in this unit.

### **Unit 6—Managing Conflicts and Working with Difficult Clients as a Special Education Advocate**

Managing conflicts and working with difficult clients can be challenging, but it's an essential part of the job as a special education advocate. Each difficult client is unique, and there's no one-size-fits-all approach on managing their respective behaviors. Patience, understanding, and effective communication are key to successfully navigating these situations while upholding your professional integrity. Unit 6 will address ways to manage conflicts and work with difficult clients as a special education advocate. Strategies to navigate such situations covered in Unit 6 include:

1. Maintain Professionalism
2. Use Active Listening
3. Set Clear Boundaries
4. Show Empathy and Understanding
5. Exhibit Strong and Effective Communication Skills

6. Manage Expectations
7. Offer Solutions
8. Stay Calm
9. Delegate If Necessary
10. Document Everything
11. Educate and Empower Clients
12. Consider Termination of Relationships with Clients When Necessary
13. Seek Support

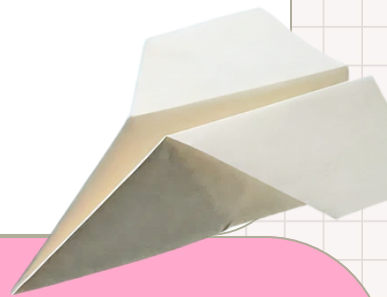


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