

ABSTRACT OF CAPSTONE

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The Graduate School
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April 28, 2023

MENTORSHIP FOR POST-SECONDARY PREPAREDNESS

Abstract of Capstone

A capstone submitted in partial fulfillment of the
Requirements for the degree of Doctor of Education in the
Ernst and Sara Lane Volgenau College of Education
At Morehead State University

By

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Naples, Florida

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Morehead, Kentucky

April 28, 2023

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MENTORSHIP FOR POST-SECONDARY PREPAREDNESS

High school administrators, teachers, coaches, and guidance counselors, collectively termed as educators, are responsible for educating teenage students while preparing them for adult life. High school students culminate their education not just with a diploma, but also a decision about what to pursue as an adult. Although there is a common desire for students to succeed in whatever their chosen endeavors, there are limited structured interactions for educators to guide students to achieve their ambitions. In broad terms, teachers focus on their curriculum and instruction and guidance counselors focus on counseling and reporting requirements. The lack of intentional mentorship has compounded the difficulty students have in deciding what to do after high school. Students require more reliable information earlier during their high school years than what is typically offered (Cranmore et al., 2019; Johnson et al., 2016). Student situations are further compounded with school guidance counselors focused on mandated counseling requirements and teachers focusing on singular subject areas so that when students can work with an educator to plan for after high school plans, they have missed prerequisite opportunities that could have better aligned with their ambitions (Blake, 2020). Receiving limited information just prior to graduation causes students to either graduate high school unprepared, graduate underprepared, become reliant on a noneducational mentor(s), become self-reliant, set lower personal goals, or struggle to elicit mentorship from a trusted educator (Cranmore et al., 2019; Johnson et al., 2016; Robinson & Roksa, 2016).

This capstone creates post-secondary mentorship and decision-making training for Florida educators and offers the use of a multiyear planning tool to focus students to identify their ambitions in personal, professional, and financial areas of interest.

Mentorship and planning should enable students to understand themselves and their environments enhancing their potential to attain their full ambitions. The visualization provided in the planning tool leverages a concise chronological depiction so that educators and students can quickly identify decision points and prerequisite requirements; locate and eliminate friction points; and seize possible opportunities to assist each student to achieve his/her specific, achievable, realistic, and timely goals.

KEYWORDS: decision-making, mentoring, Principles of Instruction, intentional mentorship, Visualization tool

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DEDICATION

This capstone is dedicated to my wife and daughter who encouraged, motivated, and supported my efforts throughout this educational effort and every other life experience and adventure. The completion of this work was only possible due to their love, faith, encouragement, understanding, patience, and devotion; of which I am most humbled and appreciative. Additionally, my parents promoted a Family Motto and our family version of the American Dream which is, “you can do any good thing you put your mind to.” My personalized version, which I consider applicable to all Americans, is, “with the right amount of determination and hard work, you can do any good thing you put your mind to.” Thanks Family!

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This would not have been possible without the encouragement from my family and the patience and support from my doctoral committee.

My committee was exceptionally understanding during a challenging time of a global pandemic, military retirement, cross-country move, and initiation of a second career. I would like to thank Dr. Chris Miller for his honesty, support, and encouragement through this process. I would like to thank Dr. John Curry for his encouragement and his help to initially realize and pursue this challenge. I would like to thank Dr. Daryl Privott for his positivity and enduring optimism.

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Executive Summary

What is the core of the capstone?

High school students require advice and counseling to efficaciously pursue post-graduation ambitions. The modern school environment requires educators to provide instruction as well as to manage a broad range of developmental and social challenges while meeting safety, health, administrative, and state-mandated learning requirements (Paolini, 2015). Though high school educators are state licensed and capable, added requirements within the school for educators combined with added complexity in post-graduation employment and educational options for students, equates to educators having very little time or ability to guide students towards their chosen ambitions (Drozdowski, 2022, Hansen, 2021).

The main premise of this capstone is to provide Florida educators with training and recommends the use of a visualization tool to assist students to achieve their ambitions following high school. The product of the capstone was to develop a training manual for educators on how to become mentors and how to use a visualization tool to assist detailing students in identifying professional, personal, and financial lines of effort to enable student-centered growth as they create and pursue their ambitions. Expanded educator duties and responsibilities have shifted educator focus on more measurable school outcomes and degraded the ability and available time of high school educators to mentor students and prepare them for adult life beyond high school graduation (Blake, 2020; Cranmore et al., 2019; Purswell, 2019). The mentorship training detailed in the capstone should provide an additional tool to

help educators empower students to incrementally manage large amounts of information. The visualization tool should assist students to analyze the significance of their researched information, synchronize actions, and understand how their ambitions impact other aspects of their lives. Students could become more active in articulating a personal vision statement and more focused on their personal destiny through the mentorship and using the visualization tool.

Students must understand the local to global environments to visualize and make informed, relevant, and timely decisions. As the quantity of data and educational requirements increase, technological tools are increasingly leveraged to assist professional people to understand and base recommendations for wise decision-making (Fourtane, 2022; Nagel, 2019). The timeliness of decisions is important due to the globalized impact decisions and actions have throughout a variety of settings. Unfortunately, high school students do not work with vast amounts of data and may not be entirely ready for life beyond high school (Buckle, 2023; Omerso, 2023). Although there have been assumptions by society at large that the youngest, up-and-coming students of the Z- and Millennial generations are intuitively prepared and able to manage the technological challenges of data manipulation to decipher vast quantities of information, this assumption may not be entirely valid (Gupta, 2023; Pickup, 2022). Instead, the utilization of large quantities of data and the technological tools to manage it, which is vastly different than managing social media platforms, should be incorporated into high schools to teach students how to utilize complex situational data and to reinforce the ability to translate data into usable,

analyzed recommendations that support decisions and actions. Students should be mentored to conduct focused research to define their own measures of success and develop a plan for what they want to do after high school.

The national reporting requirements of school programs, graduation rates, and standardized testing increased significantly beginning with the 2002, No Child Left Behind Act, which created a requirement to identify where students were making progress and where they needed additional support (One Hundred and Seventeenth Congress of the United States of America, 2002). The Every Student Succeeds Act provides information to educators, families, students, and communities through annual statewide assessments that measure students' progress, continued a requirement for student measurement and school reporting (U.S. Department of Education, 2015). To meet the annual and biannual educational reporting requirements of the Every Student Succeeds Act, high school administrators throughout the nation utilized counselors to compile massive amounts of school and student data which was aggregated at the state level and forwarded to the U.S. Department of Education to fulfill the national reporting requirements. If the data was not submitted, Title I funding would be withheld by the federal government (One Hundred Fourteenth Congress of the United States of America, 2015). As an example, the testing requirements for the state of Florida include tests for each student in “Algebra 1, Geometry, Biology 1, U.S. History or Civics (or their equivalent courses)” and additional testing is required for students classified as English Language Learners (ELL), students with significant cognitive disabilities,

and select representative students for National and International Assessments (Florida Department of Education, 2020). To execute mandated testing, Florida teachers and counselors, supported by school administrators, scheduled and administered tests and retests, tracked students on a variety of testing requirements, and collated and submitted the examination results (Florida Department of Education, 2021). Time devoted to fulfilling testing requirements prevented teachers from continuing instruction and counselors from proactively counseling students (Walsh, 2017). Educators' work towards fulfilling measurable and publicly available state educational requirements and fulfilling the reporting requirements was prioritized ahead of creating and assisting students' individual career and/or academic planning (Moeder-Chandler, 2017; Monaghan et al., 2019).

High school students do have available time for focused mentorship. In Florida, high schools provide eight classes each semester for students and in 2020, the Florida Department of Education established 24 high school credits as the diploma graduation requirement. This means students have the potential to successfully complete 32 high school credits, but eight credits are not required for meeting graduation completion. The two assumptions within Florida high schools are if students successfully complete the state-mandated educational requirements the students should become fully educated members of society and student choice for the eight additional credits should enable and fulfill personal growth and represent individual emphasis towards other ambitions.

Unfortunately, many times, students choose classes that are available rather than what could assist them with pursuing their goals. If educators wait until their high school junior and senior years to focus on post-secondary counseling, educators abdicate their responsibilities to counsel to non-educational mentors, students stress about post-secondary uncertainties, and there are fewer opportunities for students to explore their own identities to proactively plan their futures following graduation (Broughton et al., 2019; Missaghian, 2021; Robinson & Roksa, 2016).

One possible solution is to incorporate training for prospective mentors, which includes the teachers, counselors, and coaches that could mentor students, educators to utilize a visualization tool to incrementally and proactively enable students to visualize, articulate, research, and then plan what each could do after high school. The educational training could leverage problem-focused training in a facilitative environment to foster student learning using an iterative, or scaffolded, manner with the adult educator guiding students through the identification of the student's personal, professional, and financial lines of effort beginning in earnest in 9th grade.

The use of a visualization tool enables students to visualize and synchronize their planning efforts and allowing students to incrementally author their own, multi-year plan to plan high school events and beyond for several years. It would allow students an opportunity to visualize key events with ample time to gather insight and information from a variety of sources to make timely decisions to best achieve their desired outcomes. It would assist students to formulate and incorporate their high school graduation curriculum requirements to achieve their professional prerequisites.

Because educators facilitated, in lieu of directing, the students develop resiliency because they know how to alter their plan to meet new challenges, adapt to changing conditions, or achieve new or refined goals (Chandra, 2022; MindTools, 2022). The students gain a sense of self-reliance as they develop their own plan and have a basis for how their high school coursework will relate and assist them in their future endeavors (Gonser, 2021).

Educators assisting students could have prolonged advising and mentoring time with students. This mentoring would begin in the 9th grade and incrementally work with the students rather than conducting just-in-time graduation requirement counseling with students in their 11th and 12th grade years. By incorporating an easy-to-follow, visualization tool and deliberately incorporating iterative mentorship sessions earlier in high school, mentoring sessions should more effectively focus course planning to use the non-graduation course requirements over all four years and provide additional interactions between students and educators which is a proven practice to increase student grade point averages (Mahnken, 2021). The visualization tool should provide students with an easy-to-use tool to relate the most relevant information of researched material from numerous sites onto a viable plan.

The concept for this plan was derived from a U.S. Army career management pamphlet and modified to be student applicable. The U.S. Army utilized a professional development manual, the Department of the Army Pamphlet 600-3, *Officer Professional Development and Career Management* (Headquarters Department of the Army, 2010), that included a career map which outlined key jobs

and educational requirements for officers spanning a 30-year career. The planning requirements were specific to each army branch and enabled officers to plan out professional requirements sequentially for multiple years and have some professional predictability. Unfortunately, no such planning tool has been found to be utilized by educators to enable students to visualize their own learning requirements or assist in managing vast amounts of possibly relevant information. Most high school mentoring programs emphasize broad concepts of fostering communication, developing trust, and authoring goals over utilizing a specific tool to guide the mentor with interactions with his/her student(s) and support the student with identifying ambitions. Many students go to college based on studies indicating college graduates make more money. They wrongfully believe success is characterized by an individual's income (Bahney, 2019; USA Facts, 2023). The Bureau of Labor Statistics (2022) identified 1.7 million high school graduates, or 61.8 percent of students in 2021, were enrolled in colleges by that October. In contrast, the Census Bureau (2022) identified by 2021 only 10.5 percent of the population had an associate degree and 23.5 percent had a bachelor's degree. Although these statistics are not direct correlations, many students who initially pursue a higher education degree do not graduate. Having a visualization tool that enables the visualization of professional, personal, and financial ambitions, is anticipated that students could more readily relate curriculum to post-secondary ambitions, foster initiative to pursue goals, enable the management of researched data, and allow students to measure their

progression towards their individual goals not simply the goal of increased future income.

In addition to providing a visualization of a personalized plan, the visualization tool serves as a planning document and repository for related but dispersed information and acts as a handrail for mentors to train students. Students can utilize the tool to template requirements and visualize significant events in relation to other significant activities and make decisions. An example from the U.S. Army was templating professional requirements such as Permanent Change of Station (PCS) moves and knowing subsequent impacts to the officer or to his/her family or identifying when to or not to pursue a command position or a master's degree. The tool for the U.S. Army officer provided some flexibility with various position options but it also aided the officer to understand what was required for promotion. Likewise, a similar but altered visualization tool for students should enable mentors and students an ability to understand the “so what” or significance of their research, the second and third order impacts of decisions, and if or how well the individual is progressing.

A secondary effect of educators using a visualization tool to mentor and enable students to visualize a personalized plan is learning to manage large amounts of data from a variety of sources and to make decisions based on analyzed information through an acquired, improved situational understanding (Prostarseo, 2022; Raiyn, 2016). This skill parallels requirements in business, government, and military settings and introduces young people to a lifelong ability that should enable

them to maintain a competitive advantage as an adult in a globally competitive environment. Based on the 2022 results from the National Assessment of Educational Progress, math and reading scores for fourth and eighth graders declined since the onset of the COVID pandemic and mandated changes within education. The standardized test for eighth graders identified “reading scores declined in 33 states and jurisdictions” and more than a third of the students “performed below basic [levels] on the math assessment” (Jimenez, 2022). These scores indicate educational efforts in the United States were severely impacted by the COVID pandemic. The National Center for Education Statistics Commissioner released the 2022 test results and stated “... the students need to get back on track so that they can be prepared for global competition...and national competition in these [multiple] areas” (Jimenez, 2022).

It is essential that educational concepts and practices evolve to ensure students can visualize their goals, analyze information, incorporate technology, and apply classroom concepts into practicable applications that support decision requirements. The growth and development from multiple years of mentorship should assist students to compete in the current global environment which is “characterized by intensive competition” and where it is essential that businesses, governments, individuals, and organizations know and understand the requirements so that each can proactively take “all the necessary actions that will ensure sustainability and profitability” (Fragouli & Ilia, 2019, p. 77). The 2015 National Military Strategy of the United States of America identified globalization as “impacting nearly every

aspect of human activity. People, products, and information are flowing across borders at unprecedented speed and volume, acting as catalysts for economic development while also increasing societal tensions, competition for resources, and political instability” (United States Department of Defense, 2015, p. 1). In the updated 2022 National Defense Strategy, the U.S. Department of Defense reiterated the need to “...cultivate our talents, recruiting and training a workforce with the skills, abilities, and diversity we need to creatively solve national security challenges in a complex global environment” (2022 National defense strategy, 2022, p. 2). Students in high school today must develop a broad adaptiveness to compete on a variety of complex challenges.

Contrasting the current educational situation with the current global situation, students are typically given refined information in the classroom to assess, and educators largely surmise if students are interested in and understand the instruction then students can tailor it as needed in a non-educational setting (Danielson Group, 2022). Society at large has wrongly and generally assumed the innate digital prowess of school age students. Most Americans assume the “digital native” students are inherently skilled at managing data to support the ever-globalized environment and that the use of technology daily equated to a high level of digital literacy (Guillot, 2022; Sahakian, 2023). Student products tend to reiterate that students struggle with an inability to conduct detailed internet searches to seek out the necessary information to prepare themselves to understand professional, personal, and financial prerequisites

and to individually prepare themselves for life after high school (Janschitz & Penker, 2022).

This is in no way an accusation towards educators or the U.S. educational systems, but rather, it is a result of increasing educational requirements in a rapidly evolving global environment that has outpaced curriculum developers. In essence, students today are required to utilize more technological tools than every other previous generation and are required to emerge from educational endeavors as competent, globally competitive professionals (Bryant et al., 2020). To identify critical and emerging technology important for the security of the United States, the National Science and Technology Council, a special council organization answering to the President of the United States, collaborated with the U.S. National Security Council and diverse members forming the federal research and development enterprise. The published comprehensive list of critical and emerging technologies spanned five pages of capabilities and emerging capabilities that constitute advanced technologies that are potentially significant to U.S. national security (National Science and Technology Council, 2022). Previous generations had no similar challenge. The impact of the 2019 novel coronavirus, or simply COVID-19, on school age children and the necessity of leveraging remote learning rocketed the company Zoom to 300 million daily meeting minutes, a 2,900% increase in usage between December 2019 and August 2021 (Dean, 2021). This increased reliance on technology does not necessarily equate to engaged learning or enhanced student success (Wexler, 2019). Students, parents, educators, and elected officials initially

leveraged technology to help students, but later complained about learning inadequacies, abilities to disengage or not participate, mental health impacts, increased failure rates, and frustrations in learning (Berlie, 2020; Eunoia Counseling, 2020; Mandel, 2020).

The Every Student Succeeds Act (2017) identified high school graduation rates as a healthy indicator of school success. School counselor reporting satisfies national law reporting requirements which focuses on students meeting identified educational prerequisites rather than assessing or determining if the educational curriculum supports and fulfills student ambitions and abilities to excel in their chosen career fields. Previously, high school counselors struggled to delineate their daily efforts to school improvement (Blake, 2020; Dahir & Stone, 2009; Whiston et al., 2011) and refocusing counseling efforts from schoolwide data to more accurately reflect student success has the potential to skew reporting as counselors transition from reporting on graduation attainment rates and standardized testing results towards student-derived goal attainment.

Student goal attainment must be measured by mentors and school officials. The data collection should include talking with teachers and former students beyond the current data collection methods. The current model requires data to be collected prior to graduation. Realistically, post-secondary school goal attainment cannot begin in earnest until the students graduate from high school and begin pursuing their goals. Additionally, the accuracy of questionnaires requesting student feedback of how likely each student will persist with his/her plan is more subjective than the state-

mandated and neatly graded scores of standardized tests. Making this data collection and associated analytical change, however, would allow administrators the ability to make timely course modifications more accurately so that the high school educational focus shifts from high school graduation percentages to post-high school graduation success stories.

Conceptual Description of the Capstone

The rationale behind this capstone is incorporating an easy-to-use visualization planning tool that expands mentorship from school counselors to include high school teachers and focuses educators to mentor students and fulfilling the holistic growth of students including cognitive, emotional, and interpersonal domains (Purswell, 2019). The mentorship-oriented training for educators should be familiar to counselors due to their counseling-oriented education and experiences. Teachers should avoid teacher-directed learning and grading, or judging of the student responses. They may also be unfamiliar or uncomfortable with guiding a student to develop a personal vision statement and researching key dates, requirements, and events as opposed to just telling a student what to do. This concept is also a major change for students who may view mentorship interactions and discussions as ungraded or unnecessary homework requirements, but the empowerment of charting their own ambitions into a usable plan teaches resilience, fortitude, and self-reliance beyond typical coursework. In essence, students should develop and demonstrate the emotional intelligence to know themselves, using tools, such as the Myers-Briggs assessment, the Armed Services Vocational Aptitude Battery (ASVAB), or other

personality aptitude tests that highlight an affinity towards specific occupations, and then begin individualized research towards career areas of interest. The students should incrementally add specificity, as guided by their mentors, and derived from what they researched, so that each student could know when and what actions must be accomplished to meet specific prerequisites to achieve their identified goals. The individualized plan should aid the student to be all he/she can be, co-opt the student into actively managing high school course requirements, and allow educator-mentors to focus resources on the student's intended post-graduation plans.

Success is the development of mentorship training for teachers and counselors that fosters trust and honest guidance that assists students to take the appropriate actions and to make the necessary decisions to pursue their realistic ambitions following high school graduation. The main audiences for training in Florida are high school teachers and counselors that could serve as mentors for the typical high school student-protégés ages 14-18. Mentorship training participants should progress through training to assess their personal strengths and weaknesses as mentors (Broughton et al., 2019), understand student learning requirements, understand graduation requirements (Florida Department of Education, 2020), receive ideas and tools to enhance semi-structured mentorship (Seward & Gaesser, 2018), understand the visualization tool used to progress and document their mentorship efforts, and receive program measures of success. Academic counselors, teachers, parents, school administrators, and others can also leverage each student's personalized planning

visualization tool to understand the student's planning progression and assist in supporting the student to achieve his/her goals.

The educator-mentor should become a reference to the students as they approach the difficult question of 'what do you want to do after high school?' The educator training should begin to identify educators' initial understanding of how to be a mentor by eliciting what each knows about high school student mentorship requirements and by identifying individual mentorship strengths and weaknesses. Educators should progress to learn how to use open-ended questioning to foster a mentor-protégé understanding of each other and how to fill out the visualization tool. Training should progress so that educators identify key high school graduation requirements and utilize the visualization tool to assist students in understanding the time-sequencing of events and how interconnected actions relate to their achievement. Group discussions about how to identify requirements, document resources or references, and what to depict on the visualization tool should dominate this phase of training. The final training phase should allow educators to identify and demonstrate to the group how they are able to find resources or requirements and how to utilize the visualization tool with all three areas: Professional, personal, and financial. This training should highlight to the educators, especially the counselors, that mentoring students in this manner expands timeframes to several years beyond high school graduation and it depicts much more than simply academic prerequisites for graduation. When the mentors use the visualization tool, their level of understanding of the individual should far exceed what a typical academic counseling

session provides and the mentor should be able to better assist the student through the understanding of what the student wants to accomplish in life, not just what they want to accomplish in high school. Mentors should understand personal and financial ambitions and have the contextual understanding from year one, high school freshman year, to year eight, possible graduation from a four-year university on one document. The educator training sessions should discuss post-graduation activities of employment, technical certifications, apprenticeships, two-year and four-year degrees, part-time work, college saving plans, educational grants and scholarships, and other topics so that students begin understanding what is required to excel specific to their intentions.

The personalized creation of the student's multi-year plan allows the mentor to elicit information from their protégé(s) through semi-structured discussions and allows the protégé to "...build a coherent mental representation from presented material" and be "...an active sense maker..." (Mayer, 2014, p. 19) of the various detailed requirements of their ambitions. The active learning step of compiling and sequencing relevant information into the visualization tool should allow the student to internalize and fully understand requirements he/she established as keys to success. Because the visualization tool follows the cognitive theory of multimedia learning and is designed to pictorially present information, ideally on only one display or page, the student must be mindful in selecting relevant words and images from their research, organize their information coherently, and integrate previous knowledge into their pictorial representation (Mayer, 2001). The goal for the student, much as

the goal for the cognitive theory of multimedia learning, is to reduce extraneous information, manage essential details, and foster additional insight so that the student can visualize friction points, or potential problem areas, and maximize areas of opportunity. The mentor and student-protégé, as well as the parent and student, can use this visualization tool during their interactions to map out required actions, classes, certifications, activities, and other actions that should support the student's ambitions. Though not primary focal considerations, the inclusion of intentional mentorship of students should reduce stress, reduce disciplinary issues, make educational content more meaningful, and improve grades (Miranda-Chan et al., 2016).

Introduction to the Mentoring Visualization Tool

This training tool empowers educators to serve as mentors and introduces a visualization tool intended to streamline mentoring efforts so students can visualize and develop a personalized, multiyear plan to synchronize their efforts through and beyond high school. The tool enables students, beginning in the ninth grade and continuing through and beyond the twelfth grade, to synchronize, deconflict, and template events along a multiyear timeline by sequentially developing three key lines of effort: Professional, personal, and financial lines of effort. The resulting plan and visualization ensures that mentors understand their protégé-students more holistically and can offer guidance and support beyond the current simple sequencing of state-mandated high school graduation requirements. The simplicity of this plan and its foundation on a personalized vision statement, enables students to visualize

requirements to complete high school and, more broadly, pursue their dreams. The completed visualization tool enables the identification of friction points, areas of opportunity, and key decision requirements, and assists the student in gaining support from family members and friends through the visual alignment of professional, personal, and financial efforts and required actions. Once completed, the visualization tool assists students in organizing and sharing their ambitions with others and aids in situational understanding and timely decision-making as it simplifies and aligns mentor actions by establishing the student's personal vision followed by sequenced developmental areas.

Description of Capstone Deliverables

The capstone focused efforts on training educators to use a visualization tool to facilitate mentoring efforts so students can visualize and develop their personalized plans. The tool enables students to synchronize, deconflict, and template events along a multiyear timeline.

Who is the Capstone Meant to Impact?

The capstone was designed to impact educators (mentors) and students (protégés). The impact to educators is to train educators to become mentors. As mentors, they should leverage tools to help them better understand their protégé(s) so that they can provide the advice, counseling, and assistance needed for protégés to begin understanding themselves and developing into young adults. Students should develop a multiyear mentor who they can leverage and receive guidance from so they can confidently question and discuss what they need to do to then execute their plan.

Teachers, school counselors, and students generally collaborate well with the emphasis oriented toward student success. The effort of mentorship is intended to support students to provide them with the ability to relate high school course materials to a projected career, decrease stress and anxiety about life after high school plans, and leverage educational advisors at their high schools who know them more than just what they need to do to complete high school graduation requirements (Missaghian, 2021; Seward & Gaesser, 2018; Tovar, 2014).

How was the Capstone Project Implemented?

A version of the visualization tool was originally used with collegiate senior level students in the Reserve Officer's Training Corp (ROTC). This capstone was designed to modify the tool for mentoring high school students for college and career activities. Additionally, this capstone was focused on developing training for high school teachers and counselors that might mentor high school students.

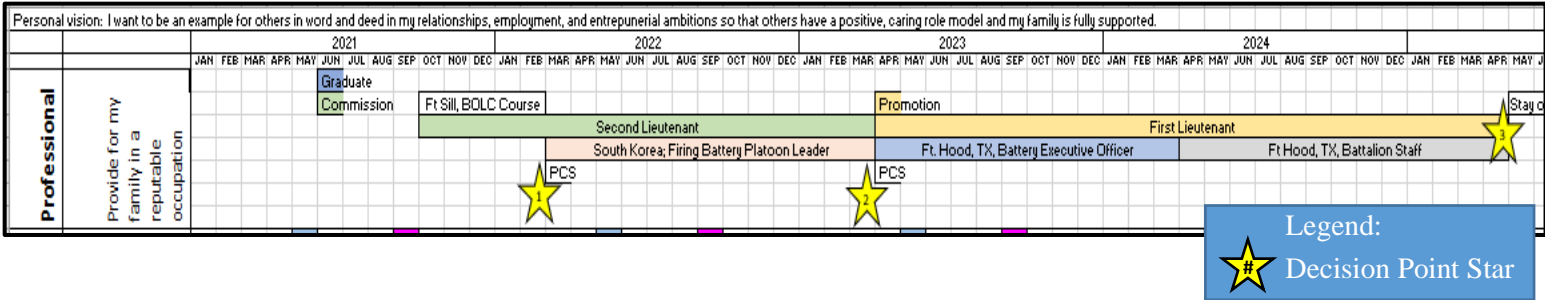
Background on the Development of the Tool

This capstone was selected due to observations at the collegiate level working with senior Reserve Officers' Training Corps (ROTC) students. The observed students failed to understand graduation requirements or predict upcoming semester requirements and had unrealistic expectations of how their personal and financial actions impacted their professional ambitions. When students were asked to utilize a simple planning tool, derived from Department of the Army Pamphlet 600-3 (2010), each student began to visualize their professional requirements for their anticipated branch, i.e., one of the eighteen officer branches that includes: Infantry, Armor,

Military Intelligence, Signal, Quartermaster, and others. The result was applicable to active duty, U.S. Army Reserve, and Kentucky Army National Guard identified cadets. The personalized army branch information, as shown in Figure 1 below, aided each student in the ability to plan out his/her professional requirements sequentially for multiple years and be able to describe what their new career meant to friends and family members. The army document provided key jobs, educational requirements, and broadening assignments for officers as they progressed from second lieutenant to colonel over a 30-year career timeline.

Two additional areas were added to the template to include personal and financial ambitions. When the university students were introduced to the professional requirements laid out by the army, they began to see how their personal desires, such as getting married, having children, starting a master's degree, buying a home, or going on special vacations, could be planned with respect to their professional requirements. The visualization tool positioned the personal ambitions between the professional and financial efforts to ensure consistency amongst the three areas. Students received financial classes and were then asked to identify and sequentially map out their financial ambitions such as savings goals, investment ambitions, asset accumulation, or debt elimination.

Figure 1
Professional Timeline

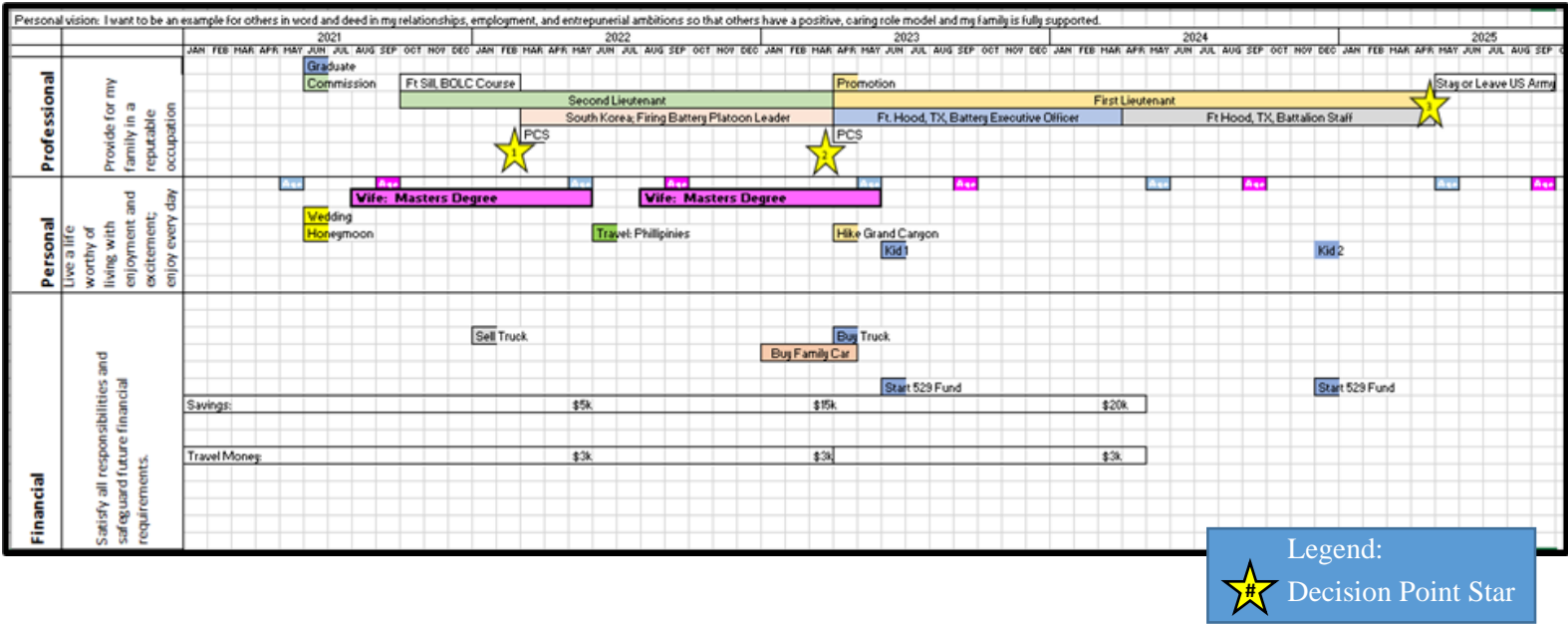


The timing of these efforts coincided with events during the fall semester. Students were required to locate the Department of the Army Pamphlet 600-3 (2010), research their first branch choice, and then brief their classmates in a five-minute presentation covering anticipated duties and requirements during the first several years of military service. Students learned how to research professional military requirements and identify similarities and differences amongst the various branches within the U.S. Army. The cadets then mapped out personal ambitions onto the same one-page document that their professional requirements were mapped onto and had to submit this assignment prior to Thanksgiving. The intended outcomes were to check on the student planning efforts and, secondarily, for the cadet to be able to discuss, in detail, with family and friends over their Thanksgiving break what to expect after graduation; receiving their U.S. Army commissions as second lieutenants; and beginning their initial training either on active duty, in the National Guard or in the U.S. Army Reserves. The U.S. Army attempted to notify cadets prior to Thanksgiving what branch they were assigned, so if the cadet did not receive his/her first choice, the cadet could begin researching his/her new requirements from the regulation. The third iteration of planning focused on the financial ambitions. This was assigned so that cadets turned in their updated plan prior to the Christmas holiday break. Again, the intent was to focus the cadet's attention so that he/she could talk with family and friends about their upcoming plans. The fourth planning assignment required students to submit an updated plan prior to spring break. This iteration reinforced the need for continuous planning across all three areas and for students to

demonstrate their abilities and flexibility in adjusting their plans when life events dictated changes.

This planning effort was initially designed to alleviate student stress, but it was soon adopted as a class requirement. By the third year of utilizing this planning tool and through discussions with instructors at other universities, the planning requirement expanded and was adopted by instructors at multiple universities to assist their cadets. The repetitive requirements of revisiting and updating the document increased the utility of the tool and the probability the cadet would continue to utilize their personalized planning efforts. The format of using graphics and limiting the planning document to one screen or one piece of paper helped cadets to visualize friction points, where there was a conflict or potential conflict of priority; areas of opportunity, or timeframes or events that could be better utilized or maximized to achieve an identified ambition; and decision points, where the cadet needed to make important decisions. The one-page document aligned events along a timeline so the cadets and instructors could visualize multiple years quickly.

Figure 2
Complete Plan Including Professional, Personal, and Financial Planning Efforts



Instructional Framing of the Training

The educator training leveraged David Merrill's First Principles of Instruction due to the task or problem centering that enables educators to utilize the demonstration, application, and integration elements of first principles (Merrill, 2002). The educator problem of 'how do I mentor a student to fully achieve his/her ambitions after high school' or 'how do I enable student decision-making for his/her post-secondary life' drives educator training. The first principles of instruction relates to mentoring students because the theory identifies learning being facilitated when learners are engaged in solving real-world problems, facilitated when existing knowledge is activated as a foundation for new knowledge, facilitated when new knowledge is demonstrated to the learner, facilitated when new knowledge is applied by the learner, and, finally, facilitated when new knowledge is integrated into the learner's world (Greenwood, 2019).

Implementation of Merrill's Problem-Centered Principle

Focusing on the student problem of 'what do I do after graduation,' the planning document attempted to proactively incorporate and align personal vision with professional, personal, and financial ambitions. The counselors at the high school and collegiate levels are overly taxed with additional responsibilities and duties and effective counseling is largely reserved for very proactive students or for a small group of students (ASCA, 2019; Monaghan et al., 2019). This planning document was designed to enable students to become advocates for themselves and maximize opportunities with counselors, or with a mentor. The students could then

lay out a reasonable plan, organize and share their ideas with others so they have context and understanding of the students' ambitions. The mentor could then provide iterative guidance to assist students with additional research or with the necessary decision-making required to execute the plan.

Implementation of Merrill's Activation Principle

Educators need to begin the activation portion of their training with an assessment of how well they can serve as a mentor. A mentor competency assessment, identifying strengths and shortfalls, is important to the mentor and in the assignment of protégés with mentors (Broughton et al., 2019; Purswell, 2019; Tovar, 2014). Knowing who you are is applicable for both the mentor and protégé. This concept is consistent with humanistic learning concepts where mentors must establish the setting, or set the conditions, to positively and empathetically assist students to know themselves and the environment the students will graduate into (Purswell, 2019).

In the military, the book, *The Art of War*, written by Sun Tzu more than 2,500 years ago, summarized this concept as, “[i]f you know the enemy and know yourself, you need not fear the result of a hundred battles” (Giles, 1910). A more simplistic version of this is, knowing yourself and your environment should make you successful. During the activation portion of training, educators should start with recalling what information they required when they were in high school and who provided that information. They should then learn to gather the necessary information about and for their protégé. That information may be family context,

socioeconomic situation, parental education, parental involvement in education and planning, language abilities of the student and family, disabilities, and learning considerations/disabilities.

Implementation of Merrill's Demonstration Principle

Educator mentors, during the demonstration portion of the training, should understand the tools utilized to assist students in visualizing the achievement of their ambitions. Mentors must understand the tools that help the student identify what is required to achieve his/her ambitions. The tools include a graduation requirement planning tool, mandated testing tracking, research information tailored towards student ambitions, and the visualization tool intended to aid in understanding and synchronizing events.

Implementation of Merrill's Application Principle

The application portion of the training should encourage the educators to identify events from the professional, personal, and financial ambitions lines of effort and place them into the visualization tool. The mentors should demonstrate the utility of the visualization tool by progressively adding information to display critical requirements that were previously researched along the timeline for each of the lines of effort. Mentors should consider all information identified as essential for student development for inclusion onto the visualization tool.

Implementation of Merrill's Integration Principle

The final portion of educator training is the integration segment when mentors demonstrate their proficiency with creating and updating the visualization tool. The

instruction should reinforce the need for positive encouragement through successive planning efforts, identify a list of follow up actions that have measurable results, and provide positive feedback and adjustments. The positive engagement with the students is essential for success since the higher the frequency a student and counselor meet to discuss the future, the greater chance for success (Tovar, 2014).

Intended Impact of the Capstone

This capstone focused on the development of a training course for educators to effectively mentor students to create a multiyear, personalized plan. The desire is that the capstone training could help mentors assist students in understanding their abilities, desires, and environment so that they are strategically positioned to pursue their realistic ambitions. Also, mentors should have the ability to leverage a visual tool to quickly identify friction points and areas of opportunity to guide students in refining their plans as needed.

Limitations of the Visualization Tool

Mentorship is not a silver bullet and finding a good match between mentors and protégés is challenging. A key limitation of this capstone is involvement of both the educators and students to begin planning as early as 9th grade. The reason this is a challenge for educators is many teachers do not currently mentor or provide life guidance to students, and counselors have too many students to counsel. As a result, teachers focus on their single subject area of emphasis and counselors can only seriously dedicate time to juniors and seniors. This is a challenge for students because the typical 9th grader lacks a mature cognitive ability due to the brain's

continued development of the prefrontal cortex into late adolescence. The prefrontal cortex coordinates higher-order cognitive processes and executive functioning such as goal-directed behavior and planning (Johnson et al., 2009).

Another limitation of this mentoring process is the difficulty of showing a short-term return on investment to administrators. Utilizing teachers and counselors to be trained and then implement counseling with students requires resources, even if it is simply time, and showing an immediate success story to justify continued use of resources and maintaining a focus on a mentorship emphasis should be difficult.

Reflections

This capstone topic was derived from my experiences teaching at both the university and high school levels and watching students struggle with making life and career decisions and for presenting information to senior military leaders to facilitate their decision-making abilities. My experiences as a military officer, responsible for briefing senior, key decision-makers, leveraged multimedia concepts to ensure memorable, clear, and concise visual aid tools that facilitated understanding and supported staff recommendations and unity of effort. Teachers and counselors can mentor students to assist them in creating a personalized visualization tool to identify opportunities and friction points, use available mentorship time efficiently and effectively, and make lasting impacts in student lives. Students should gain a better understanding of themselves; define, visualize, and articulate personal successes; and be enabled to make timely decisions in support of their personal ambitions.

Next Steps

The next step is to test the implementation of the mentorship training using the visualization tool in field trials. This next step of field trials would require training a small number of high school teachers and counselors to conduct focused mentorship with a small group of high school students. High school students participating in the Junior Reserve Officers' Training Corps (JROTC) could utilize this program throughout the school year to formalize a holistic, multi-year plan. JROTC students already formulate a written, one-page, five-year plan which could be replaced by the more comprehensive visualization tool. Mentors would work with the students to track their success during high school and beyond to determine the successful completion of mandated graduation requirements as well as post-graduation ambition attainment.

High school counselors would monitor the students participating in the study to determine how well each student progresses through high school and note the ease or difficulty of completing graduation requirements. Students should be monitored beyond graduation by mentors to determine if the students achieve their identified ambitions. Students should provide routine updates beyond their graduation to assess their achievements. School counselors and mentors should monitor students through periodic requests for feedback from students for several years, approximately five, to determine if mentorship efforts assisted the students in achieving their initial goals or if having a detailed and visual plan assisted the students in altering their goals to pursue altered ambitions. The data should identify which students provided feedback,

if they achieved their goals, if they altered their plans, what was the most lasting and influential aspect of the mentorship effort, and if they thought the high school mentorship efforts were worthwhile.

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Appendix A

Educator Training

The Educator training is divided into two primary sections. The first section is mentor training to prepare educators using David Merrill's First Principles of Instruction. The second section is focused on providing a walk-through for the mentors on how to use the mentoring visualization tool.

Mentorship Training for Florida Educators

Derek J. Carlson

2023

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Section 1

Mentor Training Using Merrill's First Principles of Instruction

This training follows David Merrill's First Principles of Instruction to prepare educators to create the four components of the visualization tool that includes: The personal vision statement and the professional, personal, and financial lines of effort (Merrill, 2002). The training is designed to help prepare educators to become mentors. Merrill's First Principles of Instruction-oriented training includes five principles:

- Task centered: Learning is promoted when learners acquire concepts and principles in the context of real-world tasks.
- Activation: Learning is promoted when learners activate, or recall, their previous knowledge related to a topic.
- Demonstration: Learning is promoted when learners can observe a demonstration of a skill that must be learned.
- Application: Learning is promoted when learners apply, or practice, a newly acquired skill.
- Integration: Learning is reinforced when learners integrate a new skill into daily life (Bailey, 2016).

Educators will progress through the identification of a problem, recall of prior knowledge, demonstrations of the skills to be learned, practice and skill refinement, and integrating new skills.

Prospective mentors must do some introspection prior to becoming mentors. Although individuals may excel in their professional roles, not every professional is capable of mentoring others. Prospective mentors should conduct some introspection to assess if they have the qualities and characteristics required to be or become a mentor. Mentors should revisit or reassess their abilities periodically, and especially following major life events or changes, because conditions may change which may inhibit or enhance an individual's mentoring abilities.

Personal Vision Statement

Principle 1 Problem Centered

How do you create an easy to remember personal vision statement?

Personal Vision Statement

Principle 2 Activation (Elicit Prior Knowledge)

Educators consider prior knowledge that assisted in their successes.

| Personal Vision Statement | | |
|---|---|-------------------|
| Principle 2 Activation | | |
| Learning Task 1: Educators identify personal desires that contributed to the identification of their identified professional ambitions. | | |
| Learning Objective 1: Educators identify their personality strengths, weaknesses, and preferences through introspection and questioning. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Direct the mentors to focus on characteristics that made them successful educators. Discuss essential characteristics that enhance an individual's credibility and discuss the best advice any mentor of theirs ever provided.</p> <p>Activity: Have the mentors answer the following questions by writing a one-sentence answer to each question.</p> <ul style="list-style-type: none"> • What are your communication abilities? • How do you prefer to communicate with others? • What are your hobbies? • Do you currently lead or supervise others? • Did you lead or supervise others in a previous occupation? • What is your available time in your schedule? • Why are you becoming a mentor? • Have you mentored others before? • What type of education do you have? • How long have you been an | Did the educator identify personality traits he/she is good at completing? | GO / NO GO |
| | Did the educator identify personality traits the mentor is comfortable in completing? | GO / NO GO |
| | Did the educator identify personality traits the mentor is neither good in completing nor comfortable in doing? | GO / NO GO |

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| educator? • Did you have a mentor as a student? • Do you currently have a mentor as a professional person? | | |
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| Personal Vision Statement | | |
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| Principle 2 Activation | | |
| Learning Task 1: Educators identify personal desires that contributed to the identification of their identified professional ambitions. | | |
| Learning Objective 2: Educators utilize external testing and assessments to determine key personality traits and the associated significance(s). | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| By understanding your emotional intelligence, specifically the four attributes of self-management, self-awareness, social awareness, and relationship management, you can determine your abilities to control your feelings and behaviors, recognize your own emotions and know how your feelings affect your thoughts and behavior, recognize group dynamics and interactions, and develop and maintain good relationships. | Did the educator conduct external testing to determine key personality traits related to interpersonal communication and interactions? | GO / NO GO |
| <p>Activity: Choose an on-line activity designed to identify your emotional intelligence and receive insight into what it means.</p> <ul style="list-style-type: none"> • Emotional Intelligence Test (Psychology Today, 2023). The test is comprehensive and asks questions in multiple ways to ensure accuracy in identifying an emotional intelligence score; 45 minute test. • Take Mind Tools Quiz (MindTools, 2023). The test is a 15-question test to establish a baseline of understanding of an individual's emotional intelligence. • Take the IHHP Quiz (Institute for Health and Human Potential, 2022). The test is a 17-question test to understand emotional intelligence specifically focused to how an | Did the educator assess and internalize the test results in relation to mentoring students? | GO / NO GO |

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| <p>individual will perform under pressure.</p> <ul style="list-style-type: none">• Myers-Briggs Test - (Practical Psychology, 2023). This test takes approximately five minutes to complete and provides insight into personality type. There is a caveat with this test, in that, your personality type can change due to experiences. Knowing each of the personality characteristics provides insight into the level of comfort of being paired with and working with a student. | | |
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| Personal Vision Statement | | |
|---|---|-------------------|
| Principle 2 Activation | | |
| Learning Task 2: Educators identify educational achievements and failures that reinforced or directed decisions. | | |
| Learning Objective 1: Educators identify significant high school classes and activities. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors should understand which courses had the most significant impact or influence on their development. The impacts could be either positive or negative. Positive influences may have blossomed into a career. Negative influences may prevent the individual from participating in related activities or identify an inability.</p> <p>Activities:</p> <p>1. Research current graduation requirements that include:</p> <ul style="list-style-type: none"> • Grade Point Average (GPA): • FL Standards Assessments (FSA): English • End of Course (EOC) Assessments: <ul style="list-style-type: none"> -Algebra 1: -Geometry: -Biology 1: -US History/Civics: • ACCESS for English Language Learners (ELLs): • FL Civic Literacy Exam (FCLE): • FL Standards Alternate Assessment FSAA): <p>2. Mentors should also be aware of any additional testing students take or participate in. Testing coordinators at</p> | Did the educator consider high school educational successes and failures and their impacts? | GO / NO GO |
| | Did the educator evaluate why he/she took the high school classes and how the classes impacted his/her high school experiences? | GO / NO GO |

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| high schools maintain data on students who have taken: <ul style="list-style-type: none">• Preliminary Scholastic Aptitude Test (PSAT)• Scholastic Aptitude Test (SAT)• American College Testing (ACT)• Armed Services Vocational Aptitude Battery (ASVAB) | Did the educator consider extracurricular activities that impacted educational achievement? | GO / NO GO |
| | Did the educator assess the overarching high school experience and lessons learned? | GO / NO GO |

| Personal Vision Statement | | |
|---|--|-------------------|
| Principle 2 Activation | | |
| Learning Task 2: Educators identify educational achievements and failures that reinforced or directed decisions. | | |
| Learning Objective 2: Educators identify significant post-secondary formal classes. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors should acknowledge learning from a variety of sources. Formal learning includes a variety of learning situation that may be related to a certification, job-specific training, or other certifications. Increasingly these training requirements may be computer-based or individually metered to simultaneously facilitate working responsibilities.</p> <p>Activity: Have the educators list out formal training they have participated in and identify the intended outcomes for each training course. Then have the educators identify the key, or most important, course or courses.</p> | Did the educator consider educational successes and failures and the associated impacts that supported post-secondary success? | GO / NO GO |
| | Did the educator identify a key consideration, activity, course, or test that supported post-secondary success? | GO / NO GO |

| Personal Vision Statement | | |
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| Principle 2 Activation | | |
| Learning Task 2: Educators identify educational achievements and failures that reinforced or directed decisions. | | |
| Learning Objective 3: Educators identify significant adult learning classes or experiences. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Experiences have a significant impact on identity and how people perceive their interactions with the world and others. Educators should be aware of how their perception is and was impacted by their experiences.</p> <p>Activities:</p> <ol style="list-style-type: none"> Educators should identify one experience for each of the following classes or experiences: <ul style="list-style-type: none"> Formal Learning Situation: Informal Learning Situation: Independent Learning Situation: Educators should consider their experiences and identify why these learning situations were significant. | <p>Did the educator consider other educational successes and failures and their impacts?</p> <p>These could be formal, adult learning or professional development classes; individual, life-long learning achievements; or on-the-job learning that contributed to the educator's identity.</p> | GO / NO GO |
| | <p>Did the educator evaluate the reasoning for why he/she pursued additional classes?</p> <p>This may have been an employment requirement, or this may have been for the joy of learning and challenging themselves.</p> | GO / NO GO |

| Personal Vision Statement | | |
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| Principle 2 Activation | | |
| Learning Task 3: Educators reflect on interpersonal relationships that influenced their ambitions and desires. | | |
| Learning Objective 1: Educators identify key personalities and interactions that contributed, positively and/or negatively, to identify a profession or personal vision. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Human interaction is essential to human development simply because humans are social beings. It is important to identify positive and negative influences that led educators to become mentors.</p> <p>Activity: Identify an extracurricular activity where a non-parent adult supported individual growth. This could be a sporting, music, leadership, or other organization. Have the educator identify why this was such a beneficial experience.</p> | Did the educator have one individual who significantly contributed (intentionally or unintentionally) towards the identification of a personal calling or profession? | GO / NO GO |
| | Does the educator currently mentor any students? | GO / NO GO |
| | Does the educator currently supervise other individuals? Previously supervise? | GO / NO GO |
| | Can the educator identify key influential individuals that negatively influenced them? Identify something learned. | GO / NO GO |
| | Can the educator identify key influential individuals that positively influenced them? Identify something learned. | GO / NO GO |

| Personal Vision Statement | | |
|---|---|-------------------|
| Principle 2 Activation | | |
| Learning Task 3: Educators reflect on interpersonal relationships that influenced their ambitions and desires. | | |
| Learning Objective 2: Educators identify their willingness to participate in large group, small group, or individual activities. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors must interact with others. Interactions could be with student(s) or with other mentors or educators that support either the mentor or student(s) or both. Mentors must know how comfortable they are to interact with others and understand how interactions impact their daily activities.</p> <p>Activity: Rank order the following situations:</p> <ul style="list-style-type: none"> • _____ Serve as a football coach with a large team. • _____ Serve as a debate club coach on a small team. • _____ Serve as a committee member. • _____ Serve as a department head. • _____ Serve as a large school, parent booster representative. • _____ Serve as a data technician for school data. • _____ Serve as an assistant coach for a specialized team | Is the educator comfortable working independently? | GO / NO GO |
| | Does the educator prefer to work in small groups of people and follow instructions from others? | GO / NO GO |
| | Does the educator prefer to work in small groups of people and lead others? | GO / NO GO |
| | Does the educator prefer to work in large groups of people and follow instructions from others? | GO / NO GO |
| | Does the educator prefer to work in large groups of people and lead others? | GO / NO GO |
| | Does the educator prefer to be considered a subject matter expert? | GO / NO GO |
| | Does the educator prefer to be considered a good coordinator? | GO / NO GO |
| | Does the educator prefer to be considered a good problem solver? | GO / NO GO |

| Personal Vision Statement | | |
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| Principle 2 Activation | | |
| Learning Task 3: Educators reflect on interpersonal relationships that influenced their ambitions and desires. | | |
| Learning Objective 3: Educators identify if they participated in a deliberate mentorship effort and what were the intended and actual outcomes. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentoring can be formal or informal. Deliberate mentorship is a formal pairing of individuals to regularly interact, achieve established goals, and maintain structured communication while informal mentorship maintains less defined roles, infrequent interactions, and ill-defined goals. Both mentorship methods can produce good results, but the formal, deliberate method tends to achieve more uniform success rates.</p> <p>Activity:</p> <ul style="list-style-type: none"> • Have the educators identify if they have ever participated in informal mentoring. Who was the mentor and what was the outcome? • Have the educator identify if they have ever participated in formal mentoring. Who was the mentor and what was the outcome? • What was a positive and negative memory from each mentoring method and why? | Did the educator participate in a deliberate mentorship effort as a <u>protégé</u> and identify a positive and negative outcome? | GO / NO GO |
| | Did the educator participate in a deliberate mentorship effort as a <u>mentor</u> and identify a positive and negative outcome? | GO / NO GO |

| Personal Vision Statement | | |
|---|--|-------------------|
| Principle 2 Activation | | |
| Learning Task 4: Educators consider other introspective insights and information that contributed to their success. | | |
| Learning Objective 1: Educators identify key situations that developed an interpersonal understanding and awareness of who they were to identify when and how situations impacted themselves. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>On occasion, highly successful individuals can identify a key situation or event that molded their outlook or resilient nature. Mentors should consider if their lives included key negative, positive, or evenly distributed situations that impacted their outlook and perspective.</p> <p>Activity: Have the educators identify significantly difficult as well as positive situations that had a significant impact on their success. These experiences may be identified uniquely by everyone. Identify why the event contributed to the individual's development.</p> | <p>Did the educator experience a significantly difficult or challenging situation that altered his/her perspective?</p> <p>Identify the significance of the event.</p> | GO / NO GO |
| | <p>Did the educator experience a significantly positive situation that altered his/her perspective?</p> <p>Identify the significance of the event.</p> | GO / NO GO |

| Personal Vision Statement | | |
|--|--|-------------------|
| Principle 2 Activation | | |
| Learning Task 4: Educators consider other introspective insights and information that contributed to their success. | | |
| Learning Objective 2: Educators consider successes and failures that contributed to self-awareness. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Individuals may have pessimistic, optimistic, or realistic outlooks, or a combination of these, that can influence how they perceive the world and others. It is important to know the outlook of the educators attempting to serve as mentors to match they appropriately to students and to motivate them towards mentoring excellence.</p> <p>Activity: Have the educators identify a significantly positive and negative situation that altered their perspective of the world. How did the educator assess the situation immediately, after a day, after a week, and after a month?</p> | <p>Did the educator have another introspectively significant <u>positive</u> experience that could be considered a crucible event that shaped his/her identity?</p> <p>(This could be an experience of someone close to the educator, a religious experience, a moment of clarity, or another event that was not identified previously.)</p> | GO / NO GO |
| | <p>Did the educator have another introspectively significant <u>negative</u> experience that could be considered a crucible event that shaped his/her identity?</p> <p>(This could be an experience of someone close to the educator, a religious experience, a moment of clarity, or another event that was not identified previously.)</p> | GO / NO GO |

Personal Vision Statement

Principle 3 Demonstration (Show Me)

Educators participate in a demonstration creating a personal vision statement.

| Personal Vision Statement | | |
|--|---|-------------------|
| Principle 3 Demonstration | | |
| Learning Task 1: Educators consider the example question "what do you want to do or be after all of your education and training is complete?" | | |
| Learning Objective 1: Educators participate in examples of various professional ambitions to determine a three-word or less professional or career ambitions. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| Educators will hear a wide variety of aspirations from students. Some students will be exceptionally motivated and certain they will pursue a very specific career field while others will graduate high school and still be uncertain about their future ambitions. Educators need to know the difference between a well-defined aspiration and one that lacks specificity and direction. Activity: Educators participate in group activities to identify careers in three words or less from a list of occupations. | Did the educators participate in the demonstration of identifying a three-word or less professional ambition? | GO / NO GO |
| | Is the professional or career ambition written in three-words or less? | GO / NO GO |

| Personal Vision Statement | | |
|---|--|-------------------|
| Principle 3 Demonstration | | |
| Learning Task 1: Educators identify the justification and significance of why someone would pursue a profession. | | |
| Learning Objective 2: Educators participate in instructor-led activities identifying good and bad examples of professional or career ambitions. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators will assist students to identify concise career fields to pursue. The careers must align with viable professions that support the students' ambitions, aptitudes, and abilities. Educators should be able to identify real, relevant careers.</p> <p>It is important to note what is not an acceptable occupation. If an individual states, "I want to go to college to..." the big picture personal vision is lost to an activity that initiates the career instead of focusing on the career as the ending objective and college being a prerequisite for entry.</p> <p>Activity: Educators should work as pairs and identify careers/occupational titles for each other. The occupations should align with an actual list of available jobs.</p> | <p>Does the educator understand the difference between a definitive and measurable versus a broadly written or poorly articulated professional ambition?</p> | <p>GO / NO GO</p> |

| Personal Vision Statement | | |
|---|---|-------------------|
| Principle 3 Demonstration | | |
| Learning Task 2: Educators identify the justification and significance of why someone would pursue a profession. | | |
| Learning Objective 1: Educators participate in examples of justifications that support professional or career ambitions. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Individuals need purpose and vision for themselves. Having a cause to believe in and something to work towards is very motivating. Adding why someone wants to do something following their occupational declaration becomes a personal vision statement. The personal vision statement is a broad statement that conveys what someone wants to do and why. This is an important starting point because it focuses the individual to articulate an overarching goal associated with their justification for their actions.</p> <p>Ask the educators, “why do you want to do that career; what is your justification for doing that profession; or what does a successful career as a ____ look like to you.”</p> | <p>Did the educator understand the one-sentence example of a justification for the professional ambition?</p> | <p>GO / NO GO</p> |

| Personal Vision Statement | | |
|---|--|-------------------|
| Principle 3 Demonstration | | |
| Learning Task 2: Educators identify the justification and significance of why someone would pursue a profession. | | |
| Learning Objective 2: Educators participate in examples of merging the professional ambition to the justification using the personal vision statement format. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators should be able to visualize examples of good and poor personal vision statements and why the specificity supports the statement being good or poor. Ask the educators, "why" multiple times to understand the root reason for an individual to pursue a chosen career-field.</p> <p>Activity: Write a personal vision statement for the following list of occupations:</p> <ul style="list-style-type: none"> • Commercial Building Architect • Cardiothoracic Surgeon • Shrimp Boat Deckhand • Orthodontist • Math Teacher • Underwater Welder | <p>Did the educator understand the format of the personal vision statement?</p> <p>(...I want to...so that...)?</p> | GO / NO GO |
| | <p>Did the educator participate in the group demonstration of evaluating well-written and poorly written personal vision statements?</p> | GO / NO GO |

Personal Vision Statement

Principle 4 Application (Let Me / Practice)

Educators practice creating vision statements.

| Personal Vision Statement | | |
|---|---|-------------------|
| Principle 4 Application | | |
| Learning Task 1: Educators consider the question "what do you want to do or be after all of your education and training is complete?" | | |
| Learning Objective 1: Educators consider a list containing poorly written and well written professional ambitions. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Direct the educators to review a list of professions. Have some professions listed as broad careers, such as ‘doctor’, and some being very specific, such as ‘underwater aluminum welder’. Use the list of occupations to enable opportunities for the educators to practice identifying specific and generic occupations.</p> <p>Activity: Have the educators circle the specific occupations in the list to differentiate them from the generic list of occupations. The goal is to limit the occupational name to three words while being specific in fully identifying an occupation. If someone could identify, “what kind” to the questioned occupation, it is not specific enough.</p> | Can the educator differentiate between a concise professional ambition and an ambiguous ambition? | GO / NO GO |

| Personal Vision Statement | | |
|--|---|-------------------|
| Principle 4 Application | | |
| Learning Task 1: Educators consider the question "what do you want to do or be after all of your education and training is complete?" | | |
| Learning Objective 2: Educators reword professional ambitions as needed. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Direct the educators to relook the list from the previous activity. Have the educators ask the question, "what kind" to each of the generic professions.</p> <p>Activity: Have the educators identify a more precise occupation for each of the generic occupations listed in the previous exercise.</p> | Is the educator able to reword to identify a more accurate description for identifying a professional or career ambition? | GO / NO GO |

| Personal Vision Statement | | |
|---|---|-------------------|
| Principle 4 Application | | |
| Learning Task 2: Educators identify the justification and significance of why someone would pursue a profession. | | |
| Learning Objective 1: Educators match professional ambitions to personal justifications using the personal vision format. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>During the application or practice phase, educators should become very familiar with the one-sentence personal vision format. The intent is for individuals to use the one-sentence personal vision statement, “I want to...so that...,” as an introductory statement to prospective employers, friends and family supporters, and to educators so that the student has a clear vision of what they want to do.</p> <p>Activity: Utilize two columns of occupations and justifications and have the educators match possible occupations to potential justifications.</p> | Did the educator identify an acceptable justification paired to an appropriate professional or career ambition? | GO / NO GO |

| Personal Vision Statement | | |
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| Principle 4 Application | | |
| Learning Task 2: Educators identify the justification and significance of why someone would pursue a profession. | | |
| Learning Objective 2: Educators evaluate if the formatted personal vision statement is specific enough for an individual to pursue. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators should be able to identify viable, accurate occupations and equally realistic justifications. The SMART objectives, or specific, measurable, achievable, realistic, and time-bound objectives, serve as a guide to focus individuals and their aspirations. Individuals who fail to fully articulate what success is or is unable to realistically achieve reasonably written justifications may never realize their ambitions simply because they are working with no clearly defined goal in sight. Ensure the educators are focused on SMART objectives in their personal vision statement sentences.</p> <p>Activity: Utilize three to five personal vision statements of varying completeness or that span multiple sentences and have the educators rewrite the vision statements to fit the format.</p> | <p>Did the educator modify, as needed, the justification to make the statement more specific, measurable, achievable, realistic, and time-bound?</p> <p>(Were SMART objectives utilized?)</p> | GO / NO GO |
| | <p>Did the educator put the professional or career ambitions together with the justification in the preformatted vision format?</p> | GO / NO GO |

Personal Vision Statement

Principle 5 Integration (Watch Me)

Educators create a personal vision statement for themselves.

| Personal Vision Statement | | |
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| Principle 5 Integration | | |
| Learning Task 1: Educators participate in training to create a personal vision statement based on their own ambitions. | | |
| Learning Objective 1: Educators identify a professional goal or ambition for what they want to do using three words or less. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| To internalize the learning and provide some insight for how prospective protégé students will react to the mentorship actions, mentors should become personally involved in the integration phase of training. | Did the educator identify and write a profession or occupation in three words or less? | GO / NO GO |
| <p>Educators must be able to visualize what their future career ambition is in one-year, five-years, or upon becoming a retired educator.</p> <p>Activity: Direct the educators to utilize one of the timeframes, one-year, five-years, or upon retirement, to write a three-word or less professional or career ambition. The occupation should utilize the SMART objectives.</p> | Does the professional occupation specifically identify what he/she wants to do after all the necessary positional prerequisites are completed? | GO / NO GO |

| Personal Vision Statement | | |
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| Principle 5 Integration | | |
| Learning Task 1: Educators participate in training to create a personal vision statement based on their own ambitions. | | |
| Learning Objective 2: Educators identify why he/she wants to do the professional ambitions identified. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors should become personally involved in the integration phase of training to internalize the learning and provide some insight for how prospective protégé students will react to the mentorship actions</p> <p>Direct students to consider and visualize what their justification is for their future career. The educators should utilize the SMART objectives and be specific.</p> <p>Activity: Tell the educators to write a one-line justification of why they want to do their identified occupation.</p> <p>Once this is written, have the educators test the justification by asking "...and then what?" This question helps to determine if the identified ambition is the end vision or if the vision is an intermediary step to a larger goal.</p> | <p>Did the educator identify a realistic justification for pursuing the occupation?</p> <p>(The justification could be career, family, income, security, religious, freedom, or any other variety of possibilities.)</p> | GO / NO GO |
| | <p>Did the educator identify a personally significant justification?</p> <p>(The justification should be of importance or meaning to the individual and not predicated on an idea that someone else has for the individual.)</p> | GO / NO GO |

| Personal Vision Statement | | |
|---|--|-------------------|
| Principle 5 Integration | | |
| Learning Task 2: Educators write and recite their personal vision statement. | | |
| Learning Objective: Educators write and recite their personal vision statement as a declaration of what they will accomplish. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Declaring the importance of the personal vision statement is essential to internalizing the statement and gaining acceptance from others. Direct the educators to review the personal vision statement and make any changes as needed. To complete this training, educators will recite their personal vision statement. This declaration reinforces the foundational requirement of trust with others participating in the training and builds individual support as educators demonstrate and reinforce learning.</p> <p>Activity: Have the educators stand and recite their one-sentence, personal vision statement to other prospective mentors. This internalization followed by a public declaration reinforces the chosen career and the associated justification.</p> | <p>Did educators create a written personal vision statement using the format of "...I want to...so that...?"</p> | GO / NO GO |
| | <p>Did educators say their personal vision statement aloud to a small group to people.</p> <p>(This becomes a 30 second elevator pitch and overarching personal vision statement.)</p> | GO / NO GO |

Professional Line of Effort**Principle 1 Problem Centered**

How do you template and synchronize professional events, educational requirements, and work-related activities, to ensure efforts align with the personal vision statement?

Professional Line of Effort

Principle 2 Activation (Elicit Prior Knowledge)

Educators consider prior knowledge that assisted in their successes.

| Professional Line of Effort | | |
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| Principle 2 Activation | | |
| Learning Task 1: Educators identify what their professional educational activities and requirements that were required to support their personal vision statement. What did they need to advance their professional career to the current point? | | |
| Learning Objective 1: Educators identify educational and employment activities that supported the achievement of the professional requirements of the personal vision statement. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors should consider multiple options for professional efforts. It is always good to know there are or were other options for a professional career. As individuals make decisions and begin pursuing one possibility over another, the list of options may reduce. It is important for prospective mentors to remember what options were available for them and why they chose their path to success. Have the educators brainstorm and possibly discuss various options they had when they were in high school.</p> <p>Activity: Create a list of information and place specific dates (month, year) next to each listed item. Educators should use their own experiences for the creation of this list and associated information.</p> <ul style="list-style-type: none"> • High school- start and graduation • College- application, acceptance, start, and graduation | Did the educator identify the completion of high school? | GO / NO GO |
| | Did the educator identify a college educational requirement? | GO / NO GO |
| | Did the educator identify a trade school requirement? | GO / NO GO |
| | Did the educator identify credentialing requirements? | GO / NO GO |
| | Did the educator identify work requirements (i.e. employment, military service, or entrepreneurial efforts)? | GO / NO GO |

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| <ul style="list-style-type: none">• Part-time job- start and termination• Full time job if did not attend college- start• Military service if did not attend college- start• Other education than college- start and completion | | |
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| Professional Line of Effort | | |
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| Principle 2 Activation | | |
| Learning Task 1: Educators identify what their professional educational activities and requirements that were required to support their personal vision statement. What did they need to advance their professional career to the current point? | | |
| Learning Objective 2: Educators utilize academic planning documents, high school credit tracker and/or undergraduate credit tracker, to identify the academic requirements per semester or term until graduation. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educational testing requirements are numerous and stressful for test takers. Mentors should know what and when required tests will be administered so that the protégés have maximum preparation time. Educators need to know how testing impacted their success and know how tests are utilized today.</p> <p>Activities:</p> <ul style="list-style-type: none"> Educators should create a list identifying testing requirements for high school graduation, acceptance into college (if required), and other tests as applicable. Educators should identify when they took the tests using a month and year format. Once the list with the associated times is created, educators should write one sentence indicating how they felt before they took the test and how they felt after the test was over. | Did the educator identify high school educational class and testing requirements? | GO / NO GO |
| | Did the educator identify any additional educational testing requirements such as the ASVAB, ACT or SAT? | GO / NO GO |
| | Did the educator identify a month and year for the testing? | GO / NO GO |
| | Did the educator identify how the test affected them before and after taking the test? | GO / NO GO |

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| Professional Line of Effort | | |
| Principle 2 Activation | | |
| Learning Task 2: Educators identify employment opportunities that provide income and/or experience to support the student. | | |
| Learning Objective 1: Educators identify their previous employment. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The work people do reinforces character traits and aids in the development of identity. Mentors need to know what early experiences they had and how their work affected their future professional successes. Ask educators about their work experiences, either at home or at a business. Have educators identify both positive and negative aspects of part-time and full-time work.</p> <p>Activity: Have the educators identify prior work experiences and identify a positive and negative aspect of each job.</p> | Did the educator consider part-time work during high school? | GO / NO GO |
| | Did the educator consider part-time work during college? | GO / NO GO |
| | Did the educator consider full-time employment following high school? | GO / NO GO |
| | Did the educator consider entrepreneurial employment following high school? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 2 Activation | | |
| Learning Task 2: Educators identify employment opportunities that provide income and/or experience to support the student. | | |
| Learning Objective 2: Educators identify transitional tasks that assist the successful transition from education to employment. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators are aware of pre-work requirements since their occupation requires training, a background investigation, and a teaching certificate. Other occupations also have requirements that bridge the gap between student, or unexperienced, and employee, or actively working in a profession.</p> <p>Ask educators if they were required to complete any specific training or participate in any internship prior to beginning at a previous job.</p> <p>Activity: Have educators discuss and write down job prerequisites. Identify how long each requirement takes to complete in terms of months.</p> | Did the educator consider internships to bridge between educational and employment efforts? | GO / NO GO |
| | Did the educator identify how to obtain job skills to assist the transition between education and employment? | GO / NO GO |
| | Did the educator consider unique requirements respective to the chosen personal vision statement? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 2 Activation | | |
| Learning Task 2: Educators identify employment opportunities that provide income and/or experience to support the student. | | |
| Learning Objective 3: Educators identify scholarship, grant, and other funding methods that they used or considered for continuing lifelong learning. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educational expenses represent a significant expense for most Americans. Begin the discussion of educational expenses by showing the US Debt Clock website (https://www.usdebtclock.org/) and discuss the overall educational debt in the United States and the educational debt per student.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Have educators look up and template the Free Application for Federal Student Aid (FASFA) at https://studentaid.gov/h/apply-for-aid/fafsa. • Have educators identify any grants, scholarships, or loans that they utilized and their thoughts about how their lives were impacted. • Have educators conduct an Internet search for current scholarships, grants, and educational loans for their area and identify the associated submission requirements and timeframes. | Did the educator identify time requirements to complete FASFA? | GO / NO GO |
| | Did the educator identify scholarship opportunities and their associated timelines for submission? | GO / NO GO |
| | Did the educator identify educational grants and their associated timelines for submission? | GO / NO GO |
| | Did the educator identify educational loans and their associated timelines for submission? | GO / NO GO |

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| Professional Line of Effort | | |
| Principle 2 Activation | | |
| Learning Task 3: Educators are introduced to the visualization tool. | | |
| Learning Objective 1: Educators are introduced to the visualization tool and understand how to template information to leverage the synchronization abilities of the tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors understand, document, and organize information using the visualization tool. As information is researched and identified, specific details that mentors and protégés need can be depicted on the timeline and be portrayed in relation to other actions. Mentors must be able to leverage the visualization tool to reduce the need for lengthy explanations.</p> <p>Begin the training by showing a blank visualization tool and end by showing an example of a completed visualization tool.</p> <p>Activity: Using the lists generated in the previous Activation activities, discuss where information will align in the professional line of effort.</p> | Does the educator understand where the personal vision statement goes? | GO / NO GO |
| | Does the educator understand where the professional line of effort information goes? | GO / NO GO |
| | Does the educator understand where the personal line of effort information goes? | GO / NO GO |
| | Does the educator understand where the financial line of effort information goes? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 2 Activation | | |
| Learning Task 3: Educators are introduced to the visualization tool. | | |
| Learning Objective 2: Educators are introduced to friction points, opportunity points, and decision points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>As mentors consider opportunities throughout their lives, they should identify situations characterized by conflicting possibilities or open opportunities to learn or work.</p> <p>Facilitate a discussion about situations where one activity precluded participation in another activity. This represents a friction point. On the visualization tool, a friction point is represented by overlapping information.</p> <p>Facilitate a discussion about periods of time that have options to fill more thoroughly with activities. This represents an opportunity point. On the visualization tool, an opportunity point is identified by a lack of significant information.</p> <p>Facilitate a discussion about identifying when to make decisions. Have the educators identify when important decisions are required for high school students. Use the completed visualization tool and identify the star used to identify a key decision point.</p> <p>Activities:</p> <ul style="list-style-type: none"> Identify a friction point on a visualization tool. | Does the educator understand what a friction point is and how it is identified on the visualization tool? | GO / NO GO |
| | Does the educator understand what an opportunity point is and how it is identified on the visualization tool? | GO / NO GO |
| | Does the educator understand what a decision point is and how it is identified on the visualization tool? | GO / NO GO |
| | Does the educator understand how to write a decision point question and where the decision point question is displayed on the visualization tool? | GO / NO GO |

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| <ul style="list-style-type: none">• Identify an opportunity point on a visualization tool.• Identify when a decision must be made concerning where to go to college.• Write a decision question that supports the personal vision statement to articulate the specific details associated with the decision. | | |
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Professional Line of Effort

Principle 3 Demonstration (Show Me)

Educators participate in a demonstration creating a professional line of effort.

| Professional Line of Effort | | |
|---|---|-------------------|
| Principle 3 Demonstration | | |
| Learning Task 1: Educators learn how to template information onto the visualization tool. | | |
| Learning Objective 1: Educators participate in creating a visualization tool by creating a timeline to match the predetermined format. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| Using the information from the previous activities, educators should have an initial understanding of sequencing events to support the overarching personal vision statement. | Did the educator template the information to fit onto one page or one computer screen? | GO / NO GO |
| Facilitate a discussion about sequencing actions to reduce stress and the identification of critical activities. | Did the educator understand how to identify the appropriate timeline horizon of at least 5 years? | GO / NO GO |
| Activity: Have educators utilize a sheet of paper and a pen/pencil to hand draw a timeline with information from previous activities. Introduce educators to span long durations and momentary instances of activities using simplistic, but identifiable, abbreviations. | Did the educator utilize point, time ranges, and longer duration timelines? | GO / NO GO |
| | Does the educator understand how to make abbreviations easy to understand and follow? | GO / NO GO |
| Once this is complete, show the completed visualization tool and describe how information is depicted for short- and long-term activities. | | |

| Professional Line of Effort | | |
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| Principle 3 Demonstration | | |
| Learning Task 1: Educators learn how to template information onto the visualization tool. | | |
| Learning Objective 2: Educators consider multiple methods for templating information and using abbreviations on the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The visualization tool leverages multimedia learning, which is defined as learning derived from words and pictures, to convey more information than could be concisely displayed on one page or computer screen. To effectively leverage the “picture worth a thousand words” concept, mentors must quickly display information and utilize abbreviations to reduce the number of words to convey the situation.</p> <p>Facilitate a discussion about how Gantt Charts work and other ways to display events that span long durations as well as events that last only a short time.</p> <p>Activity:</p> <ul style="list-style-type: none"> • Present an academic year that is depicted using a single bar on the visualization tool that spans from August one year to June on the other year. • Present an academic year that is depicted using two bars on the visualization tool, that represent the fall and spring semesters, that span from August to June. • Present an academic year that is depicted using four bars on the | Does the educator understand methods for templating educational and work experiences on the visualization tool? | GO / NO GO |
| | Does the educator understand multiple ways to display point and duration information? | GO / NO GO |
| | Does the educator display high school and college educational efforts to clearly delineate each effort from the other? | GO / NO GO |
| | Does the educator utilize abbreviations that were understandable and easy to use? | GO / NO GO |

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| visualization tool, that represent the four quarters of an academic year, that span from August to June. <ul style="list-style-type: none">• Have the educators discuss benefits and limitations of each representation. | | |
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| Professional Line of Effort | | |
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| Principle 3 Demonstration | | |
| Learning Task 2: Educators identify how to leverage the displayed information. | | |
| Learning Objective 1: Educators evaluate the displayed information to ensure it meets the intent of the personal vision statement. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Generally, people value hard work. It is important to ensure the effort expended is oriented towards the overarching personal vision statement. If not, the individual is working hard, but working towards another, or another person's, goal.</p> <p>Facilitate a discussion about aligning effort to the identified goal, i.e., the vision statement. Relook the identified information and question what should and should not be represented onto the visualization tool.</p> <p>Introduce the concept of adding required materials when prerequisite information is missing.</p> <p>Activity: Utilize an example visualization tool and template a personal vision statement that does not require a college degree. Have a college degree templated to span four years on the professional line of effort and have educators identify the effort as unnecessary. Close the discussion with the amount of cost savings, time savings, and effort saved through the identification of the unnecessary work.</p> | Does the educator understand the information on the visualization tool and how it supports the personal vision statement? | GO / NO GO |
| | Is the educator able to make secondary observations to determine critical activities on the visualization tool? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 3 Demonstration | | |
| Learning Task 2: Educators identify how to leverage the displayed information. | | |
| Learning Objective 2: Educators evaluate the efficiency and realistic depiction of the templated information. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators need to understand how to display information quickly and efficiently using the visualization tool. People can learn more deeply from words and pictures than from words alone, so it is important to ensure educators understand how to template information onto the visualization tool.</p> <p>Facilitate a discussion about depicting information using only words so that an entire paragraph is written on a page. Show a long paragraph of information as a visual representation. Then discuss pictures. Show a meme or cartoon as a visual example, and discuss how people remember pictures and words.</p> | Can the educator visualize the necessary professional activities required to achieve the desired personal vision statement? | GO / NO GO |
| <p>Close the discussion with a caution about using only colorful bars of information on the visualization tool or using color that obscures words or abbreviations, and remind educators about colorblindness and other disabilities that may undermine understanding.</p> <p>Activity: Show the educators two visualization tools that includes personal vision statements and professional lines of effort. Have the educators identify</p> | Can the educator understand the significance of each action templated onto the visualization tracker? | GO / NO GO |

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| what the individual identified as their future occupation and how far away he/she is from achieving the goal. | | |
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Professional Line of Effort

Principle 4 Application (Let Me / Practice)

Educators practice creating a professional line of effort.

| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators use the information collected from the Activation Phase and template information from the Demonstration Phase to input information onto the visualization tool showing their experiences in high school beyond their graduation. | | |
| Learning Objective 1: Educators template the high school academic requirements onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>As part of the previous activity, educators developed a list of necessary classes and tests they were required to complete as part of their high school graduation requirements. They identified the month and year of when actions were completed.</p> <p>Direct the educators to use their information to begin adding data to a visualization tool that will represent their high school activities.</p> | Does the high school tracker information match the visualization tool forecast? | GO / NO GO |
| <p>Activity: Guide the educators as they add their information to a visualization tool. The information should include their high school academic requirements. The educators should use the timeframe spanning from their 9th grade to 12th grade years.</p> | Is the templated information consistently displayed for the duration of the high school requirement? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators use the information collected from the Activation Phase and template information from the Demonstration Phase to input information onto the visualization tool showing their experiences in high school beyond their graduation. | | |
| Learning Objective 2: Educators template the college academic requirements onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>As part of the previous activity, educators developed a list of necessary classes and tests they were required to complete as part of their college graduation requirements. They identified the month and year of when actions were completed.</p> <p>Direct the educators to use their information to begin adding data to a visualization tool that will represent their college activities.</p> <p>Activity: Guide the educators as they add their information to a visualization tool. The information should include their college academic requirements. The educators should use the timeframe spanning from their first to final year in college.</p> <p>Note: If an educator did not attend university studies, skip this activity, but discuss the necessity of templating higher educational requirements onto the visualization tool.</p> | Does the undergraduate credit tracker match the visualization tool forecast? | GO / NO GO |
| | Is the templated information consistently displayed for the duration of the college requirement? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators use the information collected from the Activation Phase and template information from the Demonstration Phase to input information onto the visualization tool showing their experiences in high school beyond their graduation. | | |
| Learning Objective 3: Educators template the certification requirements onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Many positions require certification or other credentialing prior to full employment. Educators should template transitional requirements that bridge the primary efforts of education and full employment.</p> <p>Facilitate a discussion about certifications and other qualifications that support employment.</p> <p>Activity: Break into teams and identify the certification requirements and then discuss requirements associated for each of the following professions:</p> <ul style="list-style-type: none"> • Lawyer • Medical doctor • Scuba instructor • Commercial truck driver • Certified public accountant • Aluminum commercial welder <p>Direct the educators to fill in information onto the visualization tool associated with certifications.</p> | <p>Did educators template certification requirements onto the visualization tool and align them to the correct timeline location?</p> | <p>GO / NO GO</p> |

| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators use the information collected from the Activation Phase and template information from the Demonstration Phase to input information onto the visualization tool showing their experiences in high school beyond their graduation. | | |
| Learning Objective 4: Educators templated the college standardized test, ACT and SAT, requirements onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors need to know the testing requirements for their high school students. Students take a variety of standardized tests as a graduation requirement and the stress associated with the various tests can drastically vary depending on the individual and the test.</p> <p>Facilitate a discussion about what the educators identified as their standardized testing requirements. Utilize an Internet search to identify state-mandated standardized testing and consider the number of testing iterations required for a high school to have primary days of testing, make-up testing sessions, and special need sessions.</p> <p>Continue the discussion with identifying registration timeframes and requirements. Discuss university application, acceptance, and scholarship submission requirements associated with standardized testing.</p> <p>Activity: Direct the educators to fill in information onto the visualization tool associated with testing requirements.</p> | Did the educator template standardized tests onto the visualization tool? | GO / NO GO |
| | Did the educator template standardized testing registration onto the visualization tool? | GO / NO GO |
| | Did the educator template the standardized testing requirements prior to college entrance application timeframes? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators use the information collected from the Activation Phase and template information from the Demonstration Phase to input information onto the visualization tool showing their experiences in high school beyond their graduation. | | |
| Learning Objective 5: Educators template the college scholarship, grants, and financial assistance requirements onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors have the perspective to understand the cost of education following high school graduation. Mentors may have more updated information than students and their parents on tuition fees and overall costs, and opportunities to pay for education in scholarship, grants, and loans.</p> <p>Facilitate a discussion on the tuition and overall educational expenses for community colleges and four-year universities.</p> <ul style="list-style-type: none"> Utilize the National Center for Educational Statistics to research fees and costs to assist in the discussions. Utilize an Internet search to identify local grants and scholarships. <p>Activity: Direct the educators to fill in information onto the visualization tool associated with when scholarships and grant applications are due. These should be identified by organization.</p> | Did the educator template key scholarship timeframes by scholarship on the visualization tool? | GO / NO GO |
| | Did the educator template key educational grants at the appropriate times on the visualization tool? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators use the information collected from the Activation Phase and template information from the Demonstration Phase to input information onto the visualization tool showing their experiences in high school beyond their graduation. | | |
| Learning Objective 6: Educators template the part-time work requirements, during high school and college, onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors need to account for multiple activities in the professional line of effort: Education, part-time employment, and extracurricular activities constitute the majority of high school student time demands.</p> <p>Facilitate a discussion about part-time employment and use an Internet search to identify local minimum wage pay rates. High school students who work part-time jobs are introduced to job applications, interviews, pay/income, time management experiences, taxes, and coordination with employers to start and stop employment.</p> <p>Activity: Direct the educators to fill in information onto the visualization tool associated with their high school part-time employment.</p> | Did the educator template part-time employment during high school? | GO / NO GO |
| | Did the educator template part-time employment during college? | GO / NO GO |
| | Did the educator show start and stop part-time employment timeframes understanding possible location changes between high school and college? | GO / NO GO |
| | Did the educator consider part-time employment job search times and notification of termination times? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators use the information collected from the Activation Phase and template information from the Demonstration Phase to input information onto the visualization tool showing their experiences in high school beyond their graduation. | | |
| Learning Objective 7: Educators template the graduation dates and ages onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors can help students understand the temporary situation of high school by knowing when graduation and other key end dates are scheduled. Most students are excited to graduate and begin a new adventure. When mentors identify the terminal day or days, i.e., graduation and final exam days, to students, they gain confidence in both visualizing when their high school experience is complete and when they interact with others and can communicate when they will graduate.</p> <p>Facilitate a discussion with educators about their feelings associated with high school graduation. Include in the discussion challenges to focus and complete assignments as the high school graduation date approached.</p> <p>Facilitate a discussion about age-related activities as a high school student and as an adult. For high school students, there are many activities that indicate increased responsibilities or special celebrations, i.e., getting a driver's license, registering to vote, having a</p> | Did the educator determine the graduation dates, either through research or estimation, and template the date onto the visualization tracker? | GO / NO GO |
| | Did the educator template age onto the tracker using the birth month as a guide? | GO / NO GO |

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| <p>quinceañera, or registering for selective service.</p> <p>Activity: Direct the educators to fill in information onto the visualization tool associated with their high school graduation and age specific events.</p> | | |
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| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 2: Educators identify any possible friction, opportunity, or decision points. | | |
| Learning Objective 1: Educators consider the consolidated information on the visualization tool and attempt to identify friction points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>As mentors consider opportunities throughout their lives, they should identify situations characterized by conflicting possibilities or open opportunities to learn or work.</p> <p>Facilitate a discussion about situations where one activity precluded participation in another activity. This represents a friction point. On the visualization tool, a friction point is represented by overlapping information.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Review the visualization tool and identify a friction point on a visualization tool. • Consider if a decision must be made associated with the friction point. • Write a decision question that supports the personal vision statement to articulate the specific details associated with the decision. | Did the educator identify areas where templated information overlapped on the visualization tool? | GO / NO GO |
| | Did the educator consider the amount of effort or work and the associated time or location represented by each overlapping requirement? | GO / NO GO |
| | Did the educator identify a need for a key decision due to identifying a friction point? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 2: Educators identify any possible friction, opportunity, or decision points. | | |
| Learning Objective 2: Educators consider the consolidated information on the visualization tool and attempt to identify opportunity points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>High school students have opportunities to conduct activities, work, educational experiences, affiliation with volunteer opportunities, and other activities.</p> <p>Facilitate a discussion about periods of time that have options to fill more thoroughly with activities. This represents an opportunity point. On the visualization tool, an opportunity point is identified by a lack of significant information.</p> <p>Opportunity points equate to an ability to utilize time more effectively. Ideally, students pursue activities that align with their personal vision statement, but their actions could be intentionally broadening.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Identify an opportunity point on a visualization tool. • Identify if a decision must be made concerning the opportunity. • Write a decision question that supports the personal vision statement if the opportunity point warrants a decision. | Did the educator identify areas where templated information overlapped or was not accounted for by activity on the visualization tool? | GO / NO GO |
| | Did the educator consider other possible activities that could be templated to meet the personal vision statement? These could be future actions or requirements that could be conducted during the overlapped or blank areas of the visualization tool. | GO / NO GO |
| | Did the educator identify a need for a key decision due to identifying an opportunity point? | GO / NO GO |

| Professional Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 2: Educators identify any possible friction, opportunity, or decision points. | | |
| Learning Objective 3: Educators consider the consolidated information on the visualization tool and attempt to identify decision points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>As mentors consider opportunities throughout their lives, they should identify situations that require key decisions.</p> <p>Decisions can be stressful and monumental. The goal with identifying decision points is to identify when they occur, what information is required to make a decision, and what are the possible impacts from the decision.</p> <p>Facilitate a discussion about making decisions. Include the decision-making inexperience factor of teenagers and identifying a decision question.</p> <p>Activities:</p> <ul style="list-style-type: none"> Identify when a decision must be made on the visualization tool. Write a decision question that supports the personal vision statement to articulate the specific details associated with the decision. | Did the educator identify areas that required a decision using the decision point numbered star on the visualization tool? | GO / NO GO |
| | Did the educator write a decision question at the bottom of the visualization tool and identify the decision point by the correct number on the visualization tool? | GO / NO GO |
| | Did the educator identify the correct timeframe for the decision point by positioning the decision point star along the timeline correctly? | GO / NO GO |

Professional Line of Effort

Principle 5 Integration (Watch Me)

Educators create their own professional line of effort based on their future ambitions.

| Professional Line of Effort | | |
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| Principle 5 Integration | | |
| Learning Task 1: Educators participate in the creation of the professional line of effort that forecasts their current professional situation. | | |
| Learning Objective: Educators utilize their academic and work experiences to create a professional line of effort showing their work and educational efforts would using the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The visualization tool is a universal document that can support visualizing and planning for all age groups. Educators should utilize the tool to gain confidence and insight as they prepare to mentor others.</p> <p>Facilitate a discussion that enables educators to consider a future version of themselves and then encourage them to begin researching and templating the necessary requirements onto the visualization tool. The educators should envision their lives five years or more into the future, even if that includes retirement planning and/or activities.</p> <p>Activities:</p> <ul style="list-style-type: none"> Update the visualization tool with a modified personal vision statement and professional line of effort. | Did the educator template educational requirements? | GO / NO GO |
| | Did the educator template part-time and full-time work experiences? | GO / NO GO |
| | Did the educator template transitional work actions, as needed, to bridge education and employment timeframes? | GO / NO GO |
| | Did the educator identify friction points, opportunity points, and decision points on the visualization tool? | GO / NO GO |

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| <ul style="list-style-type: none">• Include the identification of friction, opportunity, and decision points associated with the templated information. | Did the educator write decision questions on the visualization tool? | GO / NO GO |
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| Professional Line of Effort | | |
| Principle 5 Integration | | |
| Learning Task 2: Educators present their personal vision statement and professional line of effort. | | |
| Learning Objective: Educators present their plan to others. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Thinking about, speaking, hearing, and informing other people about the personal vision statement and the professional line of effort is essential to internalizing the information and gaining acceptance from others.</p> <p>To complete this training, educators will recite their personal vision statement and review their professional line of effort.</p> <p>Activity: Have the educators stand and recite their one-sentence, personal vision statement and review the highlights of the professional line of effort to other prospective mentors. This internalization assists the individual who prepared and presented the information as well as provided examples for others observing.</p> | Did the educator identify the timeline? | GO / NO GO |
| | Did the educator highlight the personal vision statement and reasoning for pursuing their ambitions? | GO / NO GO |
| | Did the educator show educational requirements on the professional line of effort? | GO / NO GO |
| | Did the educator highlight friction, opportunity, and decision points for the presentation? | GO / NO GO |

Personal Line of Effort**Principle 1 Problem Centered**

How do you template and synchronize personal events so that life is enriched through the fulfillment of activities, desires, and dreams.

Personal Line of Effort

Principle 2 Activation (Elicit Prior Knowledge)

Educators consider prior knowledge that assisted in their successes.

| Personal Line of Effort | | |
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| Principle 2 Activation | | |
| Learning Task 1: Educators identify dreams and personal activities that enrich life and life experiences. | | |
| Learning Objective: Educators identify dreams that they had that were never fulfilled, experienced, or completed due to professional requirements overshadowing or blocking them from occurring. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The personal line of effort documents and schedules activities that are solely personal. Examples of personal items can be anything from attending or playing in sporting events, doing life-goal bucket-list activities, taking personal trips or vacations, getting a pet, getting a driver's license or permit, visiting family, learning to play a musical instrument, or planning any other experience.</p> <p>Facilitate a discussion with educators and encourage them to dream about activities they want to accomplish, participate in, complete, or be associated with; places they want to go; or people they want to meet.</p> <p>Activity: Have educators create a list of activities, locations, or other bucket list events they identify as important that did not happen because of</p> | Did the educator identify personal dreams for travel? | GO / NO GO |
| | Did the educator identify experiences, activities, or other dreams as important? | GO / NO GO |
| | Did the educator identify any "one day" or bucket list events they wanted to do that, for whatever reason, they delayed, cancelled, or suppressed? | GO / NO GO |

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| <u>professional</u> responsibilities or limitations. List the dreams and identify why the activities did not happen. | | |
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| Personal Line of Effort | | |
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| Principle 2 Activation | | |
| Learning Task 2: Educators identify why their previous dreams and personal activities did not happen. | | |
| Learning Objective 1: Educators identify financial requirements that overshadowed their abilities to conduct their dream or activity. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Facilitate a discussion with educators and encourage them to dream about activities they want to accomplish, participate in, complete, or be associated with; places they want to go; or people they want to meet.</p> <p>Activity: Have educators create a list of activities, locations, or other bucket list events they identify as important that did not happen because of <u>financial</u> responsibilities or limitations. List the dreams and identify why the activities did not happen.</p> | Did the educator identify a financial shortfall or essential financial obligation that prevented a dream from being fulfilled, experienced, or completed? | GO / NO GO |

| Personal Line of Effort | | |
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| Principle 2 Activation | | |
| Learning Task 2: Educators identify why their previous dreams and personal activities did not happen. | | |
| Learning Objective 2: Educators identify how not having fulfilled, experienced, or completed a personal dream or experience felt or impacted them or others. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Personal dreams impact others close friends and family members. Fulfilling dreams and aspirations has an impact on the individual as well as others by sharing experiences, building relationships, and enjoying life fully.</p> <p>Facilitate a discussion with educators that identifies significant events and pay particular attention to who participated in the events with the educator. Ask the educators if they would do the activity again and why. Ask if the individual(s) that participated in the activity would repeat the activity.</p> <p>Activity: Identify feelings and actions that resulted from not completing a personal desire or dream. Identify who else was impacted and how not completing the activity affected that individual or those individuals.</p> | Did the educator identify a feeling related to not having experienced a dream? | GO / NO GO |
| | Did the educator identify how he/she or another individual was impacted when the dream or activity did not happen? | GO / NO GO |

Personal Line of Effort

Principle 3 Demonstration (Show Me)

Educators participate in a demonstration creating a personal line of effort.

| Personal Line of Effort | | |
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| Principle 3 Demonstration | | |
| Learning Task: Educators identify how to template and leverage the displayed information. | | |
| Learning Objective 1: Educators are shown how to display information to ensure it meets the intent of the personal vision statement. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators were introduced to templating information onto the visualization tool in the professional line of effort development. This action replicates those efforts, but these efforts are tailored to, and focused on, the personal line of effort.</p> <p>Facilitate a discussion about the need to have and fulfill personal dreams. Personal dreams, like professional responsibilities, can be templated to ensure desires and activities receive consideration in planning through their visibility on the visualization tool.</p> <p>Activity: Create a list of personal activities the educators want to participate in by having</p> | <p>Does the educator understand the information on the visualization tool and how it supports the personal vision statement?</p> | <p>GO / NO GO</p> |

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| educators collaborate and share some ideas. There should be no judgement in the activities; if they are important to the educator, the dreams should be included. | Is the educator able to make secondary observations to determine critical activities on the visualization tool? | GO / NO GO |
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| Personal Line of Effort | | |
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| Principle 3 Demonstration | | |
| Learning Task: Educators identify how to template and leverage the displayed information. | | |
| Learning Objective 2: Educators view personal planning information and compare events to the professional line of effort. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors understand, document, and organize information using the visualization tool. As information is researched and identified, specific details that mentors and protégés need can be depicted on the timeline and be portrayed in relation to other actions. Mentors must be able to leverage the visualization tool to reduce the need for lengthy explanations. Begin the training by showing a blank visualization tool and end by showing an example of a completed visualization tool.</p> <p>Activities:</p> <ul style="list-style-type: none"> Utilize the list created to record desired personal activities and conduct an Internet search, as needed, to identify when specific activities occur. Template long-term and short-term activities using a similar method as the professional line of effort. | Can the educator utilize the visualization tool to assist him/her to visualize the necessary personal activities required to achieve the desired personal vision statement? | GO / NO GO |
| | Does the educator understand the significance of each action templated onto the visualization tracker? | GO / NO GO |

| Personal Line of Effort | | |
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| Principle 3 Demonstration | | |
| Learning Task: Educators identify how to template and leverage the displayed information. | | |
| Learning Objective 3: Educator learn how information from each line of effort may impact other lines of effort. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The visualization tool helps to visualize information and aids in synchronizing efforts, decision prioritization, and decision-making. Educators need the ability to organize activities and prioritize efforts as needed. The timeline and category aspects of the visualization tool helps to focus attention and understand the individual's situation.</p> <p>Facilitate a discussion about what the visualization tool depicts now that the personal vision statement is available and the professional and personal lines of effort have information to consider. As participants add information to their respective visualization tool, there will be increasing chances for friction, opportunity, and decision points.</p> <p>Discuss the importance of satisfying personal activities so that work, or business priorities, do not overshadow life-enriching events.</p> <p>Activities: Look at the visualization tool using a vertical line or vertical straight edge. As time progresses, the vertical cross-section will cross actions templated at the same time. Have the educators</p> | Did the educator consider the professional line of effort in addition to the personal line of effort information? | GO / NO GO |
| | Did the educator identify friction points, opportunity points, and/or decision points? | GO / NO GO |

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| <p>identify busy times that have significant activities templated from unbusy times that have very little templated.</p> <p>If events templated preclude another event from occurring, that becomes a friction point and may also become a decision point. Attempt to identify a friction, opportunity, and decision point on the visualization tool.</p> <p>If a decision point is identified, write a decision question to understand what decision must be made.</p> | | |
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Personal Line of Effort

Principle 4 Application (Let Me / Practice)

Educators practice creating a personal line of effort.

| Personal Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators dream and envision themselves doing activities that enhance or brings joy to life. | | |
| Learning Objective 1: Educators brainstorm to develop a list of interesting activities. This may include traveling to different locations, joining clubs or organizations, completing an adventure, or doing something desirable. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Personal activities include a wide array of important activities. These events could be extracurricular activities, group affiliation, organization participation, fitness or sports involvement, travel, club membership, or any other important activity the individual identifies as personally significant.</p> <p>Facilitate a discussion about identifying specific activities and include the SMART objectives format to specify necessary details as needed. For example, the statement, ‘I want to travel’ is broad and generic, so add specificity with the SMART objectives. A modified statement of, ‘I want to travel to the Grand Canyon this summer’ is more precise.</p> <p>Activity: Have the educators list personal line of effort activities and identify a date or date range for each activity.</p> | Did the educator develop multiple activities to consider? | GO / NO GO |
| | <p>Did the educator identify SMART objectives associated with the activities?</p> <p>(Specific, Measurable, Achievable, Relevant, Time-bound)</p> | GO / NO GO |

| Personal Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators dream and envision themselves doing activities that enhance or brings joy to life. | | |
| Learning Objective 2: Educators consider the timing of events. Some events may only happen during the summer or winter and are not yearlong capable events. This may limit when or where an event may occur. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>As individuals plan personal activities, there is a need to research specific details of the activities. Some events only occur at specific times or specific locations. Knowing the details related to an identified personal activity is important and may assist in prioritizing one activity over another.</p> <p>Facilitate a discussion about researching activities. Use an example of a photography hobby and a desire to take winter wildlife photos or a desire to visit the summer or winter Olympics.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Utilize the list created previously and research when, where, and other information that is relevant to templating the personal event onto the visualization tool. • Maintain a list of source information of any researched data for possible future use. | Did the educator research specific information to assist in locating where to place the event on the visualization timeline? | GO / NO GO |
| | Did the educator maintain a list of the reference information for possible use later? | GO / NO GO |

| Personal Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators dream and envision themselves doing activities that enhance or brings joy to life. | | |
| Learning Objective 3: Educators consider extracurricular activities and prioritize activities from their list. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors help protégés by providing perspective to their actions, situations, and ideas. Mentors and students will identify important activities for the student. It is important to not overextend the individual with activities and limit major decisions. Decisions are identified by the decision point numbered star on the visualization tool. There will be other decisions associated with the identification and templating of actions and activities onto the visualization tool.</p> <p>Facilitate a discussion that prioritizes personal activities. If there are friction points that can be solved through the prioritization of activities, then no decision point is necessary and only the key personal event is included onto the visualization tool. An example of this could be a desire to travel to an air show with various aircraft on display and visiting a distant family member at the same timeframe. If the individual can quickly prioritize between these activities, only one will be included onto the visualization tool.</p> <p>Activities:</p> <ul style="list-style-type: none"> Utilize the list previously created and rank order the importance of the | Did the educator identify activities that match their abilities or skills? | GO / NO GO |
| | Did the educator list the activities in a prioritized list? | GO / NO GO |

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| <p>activities. Then compare the activities by inputting them onto the visualization tool and determining if any activities overlap. If so, the higher priority event should be kept and the lesser should be considered for another time.</p> <ul style="list-style-type: none">• If the activities cannot be readily identified as one having a higher priority over the other, then include both on the visualization tool and include a decision point numbered star. This is a friction point that requires decision. Write a decision question to correlate to the needed decision. | | |
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| Personal Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 1: Educators dream and envision themselves doing activities that enhance or brings joy to life. | | |
| Learning Objective 4: Educators template the events onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>To fully visualize the personal events, educators need to input their information onto their visualization tool. This, like the previous professional line of effort, should be information specific to their desires for the upcoming five years.</p> <p>Facilitate a discussion about planning personal activities.</p> <p>Activity: Incorporate information from the previously derived and researched list as specific point and extended duration events in a similar manner as the professional line of effort.</p> | Can the educator template the activity onto the visualization tracker? | GO / NO GO |

| Personal Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 2: Educators identify any possible friction, opportunity, or decision points. | | |
| Learning Objective 1: Educators consider the consolidated information on the visualization tool and attempt to identify friction points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>As mentors consider opportunities throughout their lives, they should identify situations characterized by conflicting possibilities. The visualization tool includes the possibility to have friction points within each line of effort, personal and professional, and between the lines of effort.</p> <p>Facilitate a discussion about situations where one activity precluded participation in another activity. This represents a friction point. A friction point is represented by overlapping information.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Review the visualization tool and identify a friction point on a visualization tool. • Consider if a decision must be made associated with the friction point. • Write a decision question that supports the personal vision statement to articulate the specific details associated with the decision. | <p>Did the educator identify areas where templated information overlapped on the visualization tool?</p> <p>(The friction point could be in the personal LOE or between the personal and professional LOEs.)</p> | GO / NO GO |
| | <p>Did the educator identify a need for a key decision due to identifying a friction point?</p> | GO / NO GO |

| Personal Line of Effort | | |
|--|--|-------------------|
| Principle 4 Application | | |
| Learning Task 2: Educators identify any possible friction, opportunity, or decision points. | | |
| Learning Objective 2: Educators consider the consolidated information on the visualization tool and attempt to identify opportunity points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Opportunities in the professional and personal line of effort are limited only by imagination and time.</p> <p>Facilitate a discussion about periods of time that have options to creatively fill more thoroughly with activities. This represents an opportunity point. On the visualization tool, an opportunity point is identified by a lack of significant information.</p> <p>Opportunity points equate to an ability to utilize time more effectively. Ideally, students pursue activities that align with their personal vision statement, but their actions could be intentionally broadening.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Identify an opportunity point on a visualization tool and consider an activity to fill the space. • Identify if a decision must be made concerning the opportunity. • Write a decision question that supports the personal vision statement if the opportunity point warrants a decision. | <p>Did the educator identify areas where templated information overlapped, or was not accounted for by activity, on the visualization tool?</p> <p>(The opportunity point could be in the personal LOE or between the personal and professional LOEs.)</p> | GO / NO GO |
| | <p>Did the educator identify a need for a key decision due to identifying an opportunity point and write a corresponding decision question?</p> | GO / NO GO |

| Personal Line of Effort | | |
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| Principle 4 Application | | |
| Learning Task 2: Educators identify any possible friction, opportunity, or decision points. | | |
| Learning Objective 3: Educators consider the consolidated information on the visualization tool and attempt to identify decision points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>As mentors consider opportunities throughout their lives, they should identify situations that require key decisions.</p> <p>Decisions can be stressful and monumental. The goal with identifying decision points is to identify when they occur, what information is required to make a decision, and what are the possible impacts from the decision.</p> <p>Facilitate a discussion about making decisions. Consider the impacts of a decision to both the professional and personal lines of effort.</p> <p>Activities:</p> <ul style="list-style-type: none"> Identify when a decision must be made on the visualization tool using a numbered decision star. Write a decision question that supports the vision statement to articulate the specific details associated with the decision. | Did the educator identify areas that required a decision using the decision point numbered star on the visualization tool? | GO / NO GO |
| | Did the educator write a decision question at the bottom of the visualization tool and identify the decision point by the correct number on the visualization tool? | GO / NO GO |
| | Did the educator identify the correct timeframe for the decision point by positioning the decision point star along the timeline correctly? | GO / NO GO |

Personal Line of Effort

Principle 5 Integration (Watch Me)

Educators create a personal line of effort for themselves.

| Personal Line of Effort | | |
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| Principle 5 Integration | | |
| Learning Task 1: Educators participate in the creation of the personal line of effort that forecasts their current personal situation. | | |
| Learning Objective 1: Educators develop a personal LOE by dreaming about and listing what activities, organizations, and/or accomplishments they want to do or complete. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators should allow themselves to dream for themselves and create a personal line of effort plan using information they identify as important personal activities.</p> <p>Facilitate a discussion about personal dreams and the need to visualize achieving personal dreams.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Update the visualization tool with a modified personal vision statement, as needed, and create a list of desired personal activities. • Include the identification of friction, opportunity, and decision points associated with the templated information. | Did the educator create a current dream list and conduct research, as needed, to identify specific information about activities? | GO / NO GO |
| | Did the educator review or make any changes to the personal vision statement? | GO / NO GO |

| Personal Line of Effort | | |
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| Principle 5 Integration | | |
| Learning Task 1: Educators participate in the creation of the personal line of effort that forecasts their current personal situation. | | |
| Learning Objective 2: Educators utilize their list of dreams and associated research on when activities occur and where they occur to create a personal line of effort using the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The visualization tool is a universal document that can support visualizing and planning for all age groups. Educators should utilize the tool to gain confidence and insight as they prepare to mentor others.</p> <p>Facilitate a discussion that enables educators to consider a future version of themselves and then encourage them to begin templating personally important activities, group or organizational affiliation, travel, club membership, and other important activities onto the personal line of effort portion of the visualization tool. The educators should envision their lives five years or more into the future, even if that includes retirement planning and/or activities.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Update the visualization tool with a modified personal vision statement and personal line of effort. • Include the identification of friction, opportunity, and decision points associated with the templated information. | Did the educator template activities? | GO / NO GO |
| | Did the educator template travel opportunities? | GO / NO GO |
| | Did the educator template organizational involvement? | GO / NO GO |
| | Did the educator identify friction points, opportunity points, and decision points on the visualization tool? | GO / NO GO |
| | Did the educator write decision questions on the visualization tool? | GO / NO GO |

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| Personal Line of Effort | | |
| Principle 5 Integration | | |
| Learning Task 2: Educators present their personal vision statement and professional and personal lines of effort. | | |
| Learning Objective: Educators present their plan to others. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Thinking about, speaking, hearing, and informing other people about the personal vision statement and the professional and personal lines of effort is important step to internalize the information and gaining acceptance from others.</p> <p>To complete this training, educators will recite their personal vision statement and review their professional and personal lines of effort.</p> <p>Activity: Have the educators orient the audience to their visualization tool, recite their one-sentence, personal vision statement and review the highlights of the professional and personal lines of effort to other prospective mentors. This internalization assists the individual who prepared and presented the information as well as provided examples for others observing.</p> | Did the educator identify the timeline? | GO / NO GO |
| | Did the educator highlight the personal vision statement and reasoning for pursuing their ambitions? | GO / NO GO |
| | Did the educator show educational requirements on the professional line of effort? | GO / NO GO |
| | Did the educator template personal activities and important activities using the visualization tool? | GO / NO GO |
| | Did the educator highlight friction, opportunity, and decision points for the presentation? | GO / NO GO |

Financial Line of Effort**Principle 1 Problem Centered**

How do you template and synchronize financially significant information so that life is enriched, desired activities are funded, and stress is reduced?

Financial Line of Effort

Principle 2 Activation (Elicit Prior Knowledge)

Educators consider prior knowledge that assisted in their financial successes.

| Financial Line of Effort | | |
|--|--|-------------------|
| Principle 2 Activation | | |
| Learning Task 1: Educators identify baseline financial knowledge. | | |
| Learning Objective 1: Educators identify knowledge of key financial concepts of assets, liabilities, income, and expenses. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The unfortunate trend in the United States includes financial misunderstandings.</p> <p>Facilitate a discussion eliciting participation about financial concepts to include the definitions of assets, liabilities, income, and expenses. Utilize the internet to highlight the current U.S. debt, estimated educational expenses, and financial trends (U.S. National Debt Clock, 2023).</p> <p>Activities:</p> <ul style="list-style-type: none"> Utilize information, such as an example paycheck, electric bill, dividend payment, and car debt to have educators identify categories of financial obligations. For a more advanced discussion, review the definitions of an asset and a liability and consider if owning a house and paying a monthly mortgage or owning a rental property that has tenants paying monthly rent is a liability or an asset. | Does the educator know what an asset is? | GO / NO GO |
| | Does the educator know what a liability is? | GO / NO GO |
| | Does the educator know what an income is? | GO / NO GO |
| | Does the educator know what an expense is? | GO / NO GO |

| Financial Line of Effort | | |
|---|---|-------------------|
| Principle 2 Activation | | |
| Learning Task 1: Educators identify baseline financial knowledge. | | |
| Learning Objective 2: Educators complete a budget. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Budgets are money plans used to monitor and understand finances. Mentors should know how an individual's financial well-being impacts their abilities to plan, forecast, and meet obligations.</p> <p>Facilitate a discussion about creating a budget. Include in the discussion the identification of income(s) and expenses, subtracting expenses from income(s), and tracking transactions.</p> | Can the educator determine his/her income? | GO / NO GO |
| <p>Introduce or discuss the concept of forecasting using a budget to anticipate future income(s) and expenses and increasing the sources of income.</p> <p>Activity: Utilize a simple budget format to identify income(s) and expenses. Keep this activity intentionally simplistic to maintain interest and ensure educators understand financial concepts.</p> | Can the educator complete a budget using a preformatted budget? | GO / NO GO |

| Financial Line of Effort | | |
|--|--|-------------------|
| Principle 2 Activation | | |
| Learning Task 2: Educators identify educational expenses associated with college degrees. | | |
| Learning Objective: Educators identify tuition, fees, and student expenses at in-state universities utilizing the National Center for Educational Statistics website (https://nces.ed.gov/). | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators have familiarity with the educational system and generally understand educational costs simply by working in education and completing teaching certificate requirements. Educators may have a more current understanding than parents, friends, or other people who interact with high school students. Educators must present facts and be able to leverage current data to direct others.</p> <p>Display the National Center of Educational Statistics website and search universities and their tuition and other costs. Discuss actual prices related to educational debt, trends in educational pricing, and associated societal impacts related to the repayment of educational debt.</p> <p>Activity: Have educators find and compare in-state and out-of-state tuition fees and other expenses for similar degree plans.</p> | Did the educator identify universities that offer similar academic programs or degrees? | GO / NO GO |
| | Did the educator identify differences in the tuition, fees, and student expenses at multiple, in-state universities? | GO / NO GO |

Financial Line of Effort

Principle 3 Demonstration (Show Me)

Educators participate in a demonstration of how to create the financial line of effort.

| Financial Line of Effort | | |
|--|---|-------------------|
| Principle 3 Demonstration | | |
| Learning Task: Educators identify how to template and leverage the displayed information. | | |
| Learning Objective 1: Educators are shown how to display information to ensure it meets the intent of the personal vision statement. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators were introduced to templating information onto the visualization tool in the development of the professional and personal lines of effort. Completing the financial line of effort replicates those efforts, but these efforts are tailored to, and focused on, the financial line of effort.</p> <p>Facilitate a discussion about the need to have financial resources to support modern life. Financial abilities will directly impact professional responsibilities and personal desires. Financial activities should be templated on the visualization tool to ensure the financial activities receive consideration in planning.</p> <p>Activity:</p> <ul style="list-style-type: none"> Utilize a generic budget as a guide to display financial information on the visualization tool. Have educators describe how the information should look and template information for short- and longer-term activities. | Does the educator understand the information on the visualization tool and how it supports the personal vision statement? | GO / NO GO |
| | Is the educator able to make secondary observations to determine critical activities on the visualization tool? | GO / NO GO |

| Financial Line of Effort | | |
|--|--|-------------------|
| Principle 3 Demonstration | | |
| Learning Task: Educators identify how to template and leverage the displayed information. | | |
| Learning Objective 2: Educators view financial planning information and compare events to the professional and personal lines of effort. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors understand, document, and organize information using the visualization tool. Mentors must be able to leverage the visualization tool to reduce the need for lengthy explanations.</p> <p>Facilitate a discussion about the necessity of having income to support yourself and pay for your activities. Begin the training by showing a blank visualization tool and utilize a generic budget to template financial information onto a visualization tool.</p> <p>Activities:</p> <ul style="list-style-type: none"> Identify examples of long-term obligations, such as vehicle loans, personal loans, educational debt, credit card debt, and mortgages, and template these onto a blank visualization tool. Then show how financial obligations enhance or limit the other lines of effort. Alter the obligation figures to highlight being over-obligated and discuss the impacts to the other lines of effort. | Can the educator visualize the necessary financial activities required to achieve the desired personal vision statement? | GO / NO GO |
| | Can the educator understand the significance of each action templated onto the visualization tracker? | GO / NO GO |

| Financial Line of Effort | | |
|---|--|-------------------|
| Principle 3 Demonstration | | |
| Learning Task: Educators identify how to template and leverage the displayed information. | | |
| Learning Objective 3: Educators learn how information from each line of effort may impact other lines of effort. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Educators should understand financial concepts and how having financial limitations or financial abilities impact all aspects of their protégés' lives.</p> <p>Facilitate a discussion about societal hesitations to discuss financial matters.</p> <p>Facilitate a discussion by changing the financial conditions on a templated budget. Explain and discuss how added income or added debt impacts the individual. Highlight as income increases, typically debt levels similarly trend.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Using a templated budget, have educators identify percentages of debt payments to income. Identify how the professional and personal lines of effort would be impacted by having a 10%, 20%, 30%, then 50% portion of income going directly to financial obligations. • Identify friction points as an inability to meet financial obligations. • Identify opportunity points as achieving savings or investing goals. | Did the educator consider the professional and personal lines of effort in addition to the financial line of effort information? | GO / NO GO |
| | Did the educator identify friction points, opportunity points, and/or decision points? | GO / NO GO |

Financial Line of Effort

Principle 4 Application (Let Me / Practice)

Educators practice creating financial lines of effort.

| Financial Line of Effort | | |
|---|---|-------------------|
| Principle 4 Application | | |
| Learning Task 1: Educators template information onto a financial line of effort using their information. | | |
| Learning Objective 1: Educators identify savings or investing goals for the next five years and template the goals onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The visualization plan assists the planning process, and the financial line of effort concentrates on the financial aspects of visualizing, organizing, understanding, and planning.</p> <p>Facilitate a discussion about SMART objectives and the need to specifically identify numerical values for goals, expenses, and incomes.</p> <p>Activity: Have educators list savings and/or investing goals for the next five years. Encourage the educators to be specific using dates and dollar figures so that they can assess their efforts in the future.</p> | Did the educator identify a savings goal? | GO / NO GO |
| | <p>Did the educator identify SMART objectives associated with the activities?</p> <p>(Specific, Measurable, Achievable, Relevant, Time-bound)</p> | GO / NO GO |

| Financial Line of Effort | | |
|--|--|-------------------|
| Principle 4 Application | | |
| Learning Task 1: Educators template information onto a financial line of effort using their information. | | |
| Learning Objective 2: Educators identify debt reduction goals for the next five years and template the goals onto the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Reducing the amount of debt and associated interest payments is a way an individual can more responsibly use income.</p> <p>Facilitate a discussion on the snowball and avalanche methods for debt reduction. Utilize an Internet calculator that can calculate both types of calculations. Define the snowball method as paying off the smallest to largest debt and building momentum as bills are paid off. Define the avalanche method as paying the highest to lowest interest rate debt as bills are paid off.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Provide educators a preformatted budget which shows multiple financial obligations which need to be paid in full. • Have educators utilize an Internet calculator to identify the fastest way to pay off debt, the total amount of debt and interest paid off, and the amount of time required to pay off debt. | <p>Did the educator identify total debt, interest payments, and incremental achievements for multiple years?</p> | <p>GO / NO GO</p> |

| Financial Line of Effort | | |
|--|---|-------------------|
| Principle 4 Application | | |
| Learning Task 1: Educators template information onto a financial line of effort using their information. | | |
| Learning Objective 3: Educators template when they will file federal taxes each year on the visualization tool. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Federal income tax for individuals is typically filed on or about 15 April each year. Some years fluctuate depending on weekends.</p> <p>Facilitate a discussion with educators about when they prefer to file their taxes. Some individuals file early in anticipation of a tax return while some file late in anticipation of a tax payment. Discuss when individuals file their taxes.</p> <p>Activity: Using a visualization tool, have the educators identify when the intend to file taxes each year for the next five years. Utilize a similar abbreviation system as the previous lines of effort for short duration events.</p> | Did the educator template filing federal taxes prior to the normal deadline or extended deadline? | GO / NO GO |
| | Did the educator template taxes for multiple years? | GO / NO GO |

| Financial Line of Effort | | |
|---|--|-------------------|
| Principle 4 Application | | |
| Learning Task 1: Educators template information onto a financial line of effort using their information. | | |
| Learning Objective 4: Educators template major, specific financial goals onto the visualization tool. These could be paying off a vehicle loan, working towards a specific wedding or vacation budget, or paying off a mortgage. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The visualization tool provides a picture with limited words to assist in the visualization of the situation.</p> <p>Facilitate a discussion with educators about how visualizing financial responsibilities assists in meeting financial goals and paying obligations efficiently.</p> <p>Activity:</p> <ul style="list-style-type: none"> • Provide educators with a generic budget that includes multiple obligations and goals, i.e., vehicle payments with payoff dates forecasted, mortgage amounts, anticipated tax bills, savings goals, and investing goals. • Have the educators use a visualization tool to visually depict and label information in both short-term and long-term formats with similar abbreviations to the previous lines of effort. | Did the educator develop a way to visually translate the achievement of financial goals on the visualization tool? | GO / NO GO |
| | Are the goals distinct and recognizable using the SMART objectives? | GO / NO GO |

| Financial Line of Effort | | |
|---|--|-------------------|
| Principle 4 Application | | |
| Learning Task 2: Educators identify any possible friction, opportunity, or decision points. | | |
| Learning Objective 1: Educators consider the consolidated information on the visualization tool and attempt to identify friction points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>As mentors consider opportunities throughout their lives, they should identify situations characterized by conflicting possibilities. The visualization tool includes the possibility to have friction points within each line of effort and between the lines of effort.</p> <p>Facilitate a discussion about situations where one activity precluded participation in another activity. This represents a friction point. On the visualization tool, a friction point is represented by overlapping information.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Review the visualization tool and identify a financial friction point. This could be an inability to meet a saving goal while paying off debt. • Consider if a decision must be made associated with the friction point. • Write a decision question that supports the personal vision statement and addresses the associated decision. | <p>Did the educator identify areas where templated information overlapped on the visualization tool?</p> <p>(The friction point could be between the professional or personal LOE and the financial LOE or solely located within the financial LOE.)</p> | GO / NO GO |
| | <p>Did the educator identify a required decision due to identifying a friction point?</p> | GO / NO GO |

| Financial Line of Effort | | |
|--|--|-------------------|
| Principle 4 Application | | |
| Learning Task 2: Educators identify any possible friction, opportunity, or decision points. | | |
| Learning Objective 2: Educators consider the consolidated information on the visualization tool and attempt to identify opportunity points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Opportunities in the financial LOE may require inputs from the professional and personal LOE's in the form of income and/or time.</p> <p>Facilitate a discussion about periods of time that have options to creatively fill more thoroughly with activities. This represents an opportunity point. On the visualization tool, an opportunity point is identified by a lack of significant information.</p> <p>Opportunity points equate to an ability to utilize time more effectively. Ideally, students pursue activities that align with their personal vision statement, but their actions could be intentionally broadening.</p> <p>Activities:</p> <ul style="list-style-type: none"> Identify an opportunity point on a visualization tool in the financial LOE and consider an activity to fill the space. This could be a part-time job opening a business or investing. Identify if a decision must be made concerning the opportunity. Write a decision question that supports the personal vision statement if the opportunity point warrants a decision. | <p>Did the educator identify areas where templated information overlapped or was not accounted for by activity on the visualization tool?</p> <p>(The opportunity point could be in the personal LOE or between the personal and professional LOEs.)</p> | GO / NO GO |
| | <p>Did the educator identify a need for a key decision due to identifying an opportunity point?</p> | GO / NO GO |

| Financial Line of Effort | | |
|--|---|-------------------|
| Principle 4 Application | | |
| Learning Task 2: Educators identify any possible friction, opportunity, or decision points. | | |
| Learning Objective 3: Educators consider the consolidated information on the visualization tool and attempt to identify decision points. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Mentors should identify situations that require key decisions.</p> <p>Decisions can be stressful and monumental. The goal with identifying decision points is to identify when they occur, what information is required to make a decision, and what are the possible impacts from the decision.</p> <p>Facilitate a discussion about making decisions. Consider the impacts of a decision to both the professional and personal lines of effort.</p> <p>Activities:</p> <ul style="list-style-type: none"> • Utilize a visualization tool and identify a decision related to a financial event. • Identify when a decision must be made on the visualization tool using a numbered decision star. • Write a decision question that supports the vision statement to articulate the specific details associated with the decision. | Did the educator identify areas that required a decision using the decision point numbered star on the visualization tool? | GO / NO GO |
| | Did the educator write a decision question at the bottom of the visualization tool and identify the decision point by the correct number on the visualization tool? | GO / NO GO |
| | Did the educator identify the correct timeframe for the decision point by positioning the decision point star along the timeline correctly? | GO / NO GO |

Financial Line of Effort

Principle 5 Integration (Watch Me)

Educators create a financial plan using the visualization tool line of effort.

| Financial Line of Effort | | |
|---|---|-------------------|
| Principle 5 Integration | | |
| Learning Task 1: Educators participate in the creation of their own financial line of effort that forecasts their current money-related situation. | | |
| Learning Objective: Educators utilize their financial goals associated with savings, asset generation, and debt reduction to ensure all aspects of the financial and other lines of effort are fully resourced. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>The visualization tool is a universal document that can support visualizing and planning for all age groups. Educators should utilize the tool to gain confidence and insight as they prepare to mentor others.</p> <p>Facilitate a discussion that enables educators to consider a future version of themselves and then encourage them to begin templating financially important activities, savings goals, investment goals, debt reductions efforts, and other activities onto the financial line of effort portion of the visualization tool. The educators should envision their lives five years or more into the future, even if that includes</p> | Did the educator template savings goals? | GO / NO GO |
| | Did the educator template investing goals? | GO / NO GO |
| | Did the educator template debt reduction goals? | GO / NO GO |
| | Do the financial obligations and ambitions include specific amounts and dates? (SMART objectives) | GO / NO GO |
| | Did the educator identify friction points, opportunity points, and decision points on the visualization tool? | GO / NO GO |

| | | |
|--|---|------------|
| <p>retirement planning and/or activities.</p> <p>Activities:</p> <ul style="list-style-type: none">• Update the visualization tool with a modified personal vision statement, if necessary, and insert information into the financial line of effort.• Include the identification of friction, opportunity, and decision points associated with the templated information. | Did the educator review or make any changes to the personal vision statement? | GO / NO GO |
| | Did the educator write decision questions on the visualization tool? | GO / NO GO |

| Financial Line of Effort | | |
|---|--|-------------------|
| Principle 5 Integration | | |
| Learning Task 2: Educators present their personal vision statement and professional, personal, and financial lines of effort. | | |
| Learning Objective: Educators present their plan to others. | | |
| How to Prepare for this training | Check for Understanding/Learned Ability | Assessment |
| <p>Thinking about, speaking, hearing, and informing other people about the personal vision statement and the professional and personal lines of effort is important step to internalize the information and gaining acceptance from others.</p> <p>To complete this training, educators will recite their personal vision statement and review their professional, personal, and financial lines of effort.</p> <p>Activity: Have the educators orient the audience to their visualization tool, recite their one-sentence, personal vision statement and review the highlights of the professional, personal, and financial lines of effort to other prospective mentors. This internalization assists the individual who prepared and presented the information as well as provided examples for others observing.</p> | Did the educator identify the timeline? | GO / NO GO |
| | Did the educator highlight the personal vision statement and reasoning for pursuing their ambitions? | GO / NO GO |
| | Did the educator show educational and work requirements on the professional line of effort? | GO / NO GO |
| | Did the educator template personal activities and important activities using the visualization tool? | GO / NO GO |
| | Did the educator show the financial situation and describe how it impacts all aspects of the visualization tool identified activities? | GO / NO GO |
| | Did the educator highlight friction, opportunity, and decision points for the presentation? | GO / NO GO |

Section 2

Mentor Training for Using the Mentoring Visualization Tool

Description of the Visualization Tool

The visualization tool is intentionally simplistic and synchronizes planning utilizing a timeline. The visualization tool is intended to present information onto one display or piece of paper to help students and mentors consolidate research information and synchronize seemingly discrete efforts. Mentors should utilize a visualization tool that spans multiple years; preferably five to ten years, to mentor students. The visualization tool in this mentoring training is derived from a U.S. Army career management pamphlet. There are three major sections to the timeline: Professional, personal, and financial lines of effort. These sections are completed sequentially so that the professional ambitions of the student are identified first, followed by the personal and financial ambitions. By focusing the students onto one line of effort at a time, the students progressively develop a plan through research and introspection so they can visualize what is required to achieve the overarching personal vision statement. Students utilize symbols and abbreviations to eliminate clutter and focus their efforts onto a one-page map or visualization of required actions. Appendix C includes an example of a blank visualization tool and Figure A1 represents a completed visualization tool.

Preparing to Use the Visualization Tool

Teachers and counselors must be proficient in five specific areas to effectively serve as mentors using this method. Mentors must be able to assess their personal abilities in mentorship, understand student learning requirements and abilities, understand graduation requirements, understand the three lines of effort in the visualization tool, and understand the program measure of success. Appendix A provides training for Mentors to prepare for working with students through the career mentoring process.

Proficiency 1 - Mentors must be able to assess their personal mentorship abilities. This takes some personal accountability and introspection in multiple areas that include proficiency in oral and written communication, awareness of technological abilities, knowledge of educational and post-graduation employment opportunities, and an aptitude in interpersonal and listening skills.

Proficiency 2 - Mentors must understand student learning requirements and abilities. The mentor must do this using two main forms of discovery: Records checks and dialogue with the student. Mentors should look up educational documents to begin to understand their student-protégé. This information could be as simple as evaluating previous grades, report cards, disciplinary records, and standardized testing results. The research may include the identification of special educational requirements or speaking with the student and with other teachers and counselors about student needs and desires.

Proficiency 3 - Mentors must understand the local graduation requirements.

The graduation requirements will differ by state due to state law for high school students, but they should never be a surprise for students. Utilizing a graduation tracker, such as the High School Credit Graduation Tracker (See Appendix B) is an excellent way to know and understand what is required for graduation as well as a guide to track progression towards graduation. Mentors should be aware of class and testing requirements for graduating students to facilitate their transition into the workforce, their ability to pursue entrepreneurial endeavors, or their onward progression to higher education. Knowledgeable mentors can monitor student progression and address questions and/or concerns that students may have so they are ready for their post-graduation requirements and ambitions.

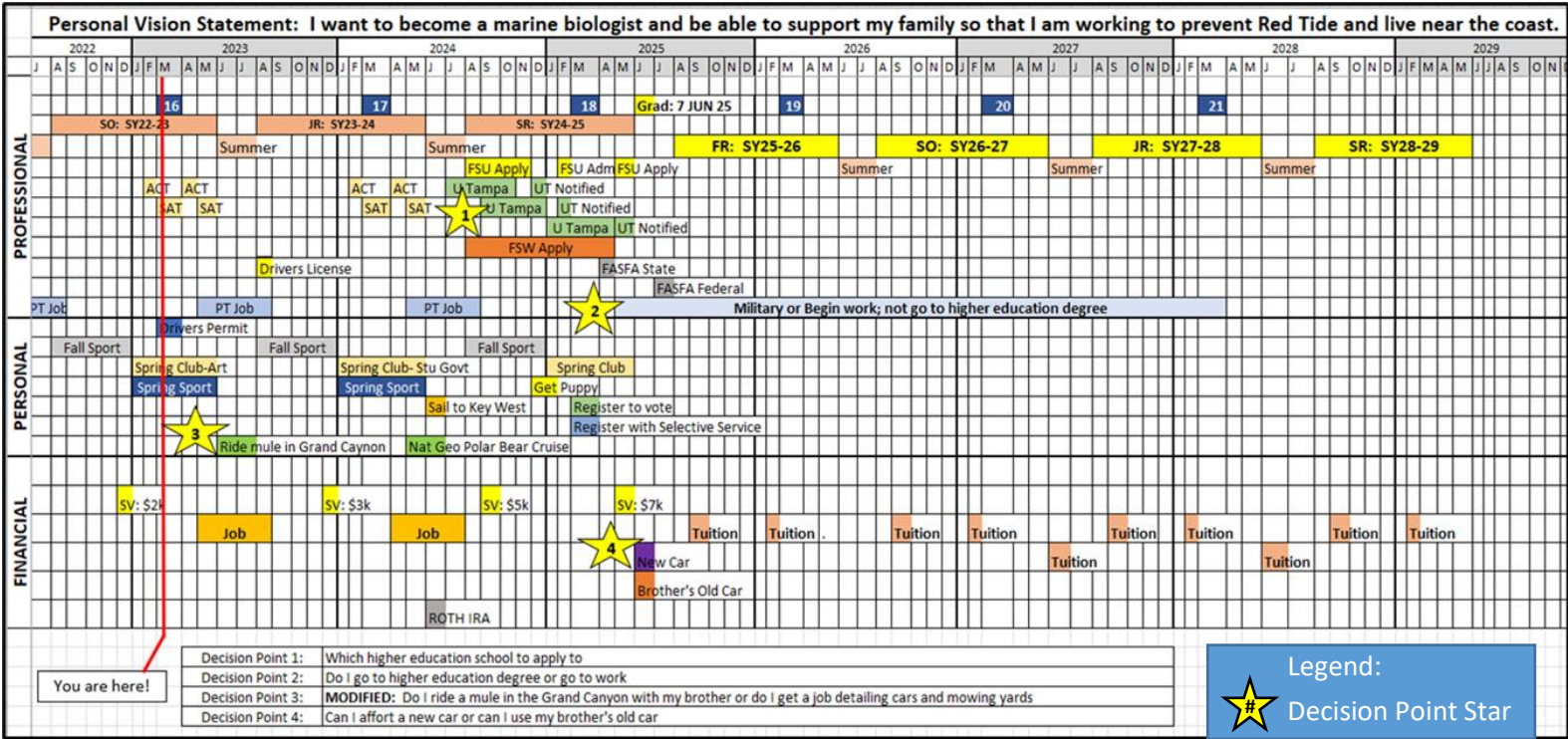
Proficiency 4 - Mentors must be able to understand the personal vision statement and three lines of effort in the Visualization Tool described in this training.

Proficiency 5 - Mentors must understand the program measure of success.

The only measurable deliverable from this mentorship process is the creation of the student's plan. The plan includes the vision and the professional, personal, and financial lines of effort.

Figure A1

Example of Completed Visualization Tool



Timeline for using the Visualization Tool

The mentor should sequence the efforts for the student to build the plan over the course of the school year so that the personal vision is completed in early fall, the professional line of effort is completed prior to Thanksgiving break, the personal line of effort is completed prior to the winter break, and the financial line of effort is completed prior to spring break.

- August/September– Personal Vision
- October/November– Professional Line of Effort
- December/January – Personal Line of Effort
- February/April – Financial Line of Effort

This progression and sequencing ensures the student is focused on one effort at a time.

Orientation to the Personal Vision and Three Lines of Effort

The visualization tool places the personal vision statement at the top of the page, preferably in one line, with a multiyear timeline and the three lines of effort beneath. The timeline utilizes months and years to align actions within the lines of effort. The professional line of effort is the top-most line of effort and the area that requires the most assistance in filling out. Nested beneath the professional line of effort is the personal line of effort. The actions of planning personal desires require sequencing events to align with the templated professional requirements. The financial line of effort is at the bottom of the visualization tool. The student's

professional results and the personal desires are accounted for in the financial line of effort as expenses, income, and investment goals to support what the mentee wants to do. Once the visualization tool is completed, a mentor can quickly visualize the mentee's vision, ambitions, and direct research and then coordinate resources and recommend actions to support additional planning. Mentees gain confidence knowing their goals and ambitions are realistic and achievable, maintain focus in making decisions to support their future ambitions, and save time by knowing the necessary actions to pursue their goals.

A blank copy of the templated visualization tool can be found in Appendix C. The visualization tool is intentionally simplistic. As mentees fill in data, the degree of detail tends to begin with good definition and certainty. It is easy to template parent-directed or state law mandated requirements, but as the mentee templates actions into the further away years, mentees generally have difficulty filling in information beyond educational requirements. The timeframe of the visualization tool intentionally spans beyond educational graduation horizons to force mentees to visualize a professional life as young adults pursuing their unique plan.

Walkthrough of Using the Visualization Tool

The professional line of effort, which includes high school and other educational requirements (i.e., trade school, two- and four-year degrees), allows the student to template state-mandated, high school class requirements and other professional requirements spanning multiple years. Typically, students learn to abbreviate and develop symbols in this line of effort to represent their required

actions for the first time. Personal ambitions and desires, such as family planning, travel, and group or club membership, are nested between the professional and financial lines of effort. The financial line of effort is the last line of effort to develop. This line of effort includes income and expense forecasts, saving and investing goals, and large purchases. Collectively, these lines of effort organize actions so that students can visualize the various required actions to achieve their personal vision statement. Mentors assist students as they progress through the creation of the visualization tool and identify friction points, areas of opportunity, and key decision points.

The visualization tool places the personal vision statement at the top of the page, preferably in one line, with a multiyear timeline and the three lines of effort beneath. The timeline utilizes months and years to align actions within the lines of effort. The professional line of effort is the top-most line of effort and the area that requires the most assistance in filling out. Nested beneath the professional line of effort is the personal line of effort. The actions of planning personal desires require sequencing events to align with the templated professional requirements. The financial line of effort is at the bottom of the visualization tool. The student's professional results and the personal desires are accounted for in the financial line of effort as expenses, income, and investment goals to support what the mentee wants to do. Once the visualization tool is completed, a mentor can quickly visualize the mentee's vision, ambitions, and direct research and then coordinate resources and recommend actions to support additional planning. Mentees gain confidence

knowing their goals and ambitions are realistic and achievable, maintain focus in making decisions to support their future ambitions, and save time by knowing the necessary actions to pursue their goals.

When mentees fill in the information, they begin visualizing a possible future for themselves. It is possible for mentees to begin visualizing multiple options which requires a decision to determine which future they want to pursue. In Figure A1, the mentee templated a vision statement of becoming a marine biologist. The visualization tool forecasts a high school graduation in June 2025 and graduating from higher education in May 2029 or joining the military in 2025 after high school. When mentees fill in the information into the visualization tracker, they can begin visualizing how their decisions impact all aspects of their lives

Important Points about the Visualization Tool

The visualization tool is not intended to serve as a daily planner. Mentees should template the major actions so that friction points, opportunity points, and decision points are visible on a chronological and personalized map and not get so detailed with daily activities or wordy explanations that the visualization tool becomes cluttered and confusing. Micromanagement down to the daily activity level obscures and confuses future ambitions with additional clutter on the visualization tool rather than clarifying and streamlining efforts towards identified goals.

The Personal Vision Statement

Purpose of the Personal Vision Statement.

The creation of a personal vision statement is an important starting point for a mentorship effort because it focuses the individual to articulate an overarching goal or theme. The personal vision statement becomes a broad statement that conveys what the student wants to become or what the student wants to do and, most importantly, why he/she wants to be or do the identified career.

For mentoring purposes, the personal vision statement is the foundational statement that the student creates to focus research, planning, and decision-making. The personal vision statement narrows the focus of the mentorship and aligns the three lines of effort. For high school students, the personal vision statement may initially change wildly, and the student could revisit it multiple times. Rewriting or totally changing the personal vision statement simply means the mentee wants to alter life ambitions either partially or radically. Personal vision statement changes are expected and manageable since nearly everyone makes changes to their ambitions throughout life. With maturity and experience, the statement becomes a semi-permanent statement, especially for adults. The creation of the personal vision statement should not limit an individual to a specific occupation or future.

Best Practices for the Personal Vision Statement.

The best practice and most simplistic method for creating a personal vision statement is to talk with the mentee and have him/her identify what he/she wants to do or be in three words or less after all the required education or training is complete.

Then have the student write his/her intentions into one sentence using the format: “I want to...so that...” This model is intentionally simplistic and memorable. After writing the vision statement, students can quickly remember their statement and concisely communicate the statement to others. Table A1, provides examples of personal vision statements.

Table A1

Examples of Personal Vision Statements

| Example Type | Example | Rationale |
|---------------------|---|---|
| Good Example | I want to become a dentist so that I can have a lifelong career helping people and their dental health. | Career is definitive and measurable. |
| Bad Example | I want to work in education so that I can work with young people. | Too broad in both the occupation and goal. |
| Bad Example | I want to go to college to get a degree in psychology so that I can help people. | Commonly but poorly worded personal vision focused on a few years of effort not a major life achievement. |

Ways to Revise Bad Personal Vision Statements.

When you are faced with mentees writing bad personal vision statements there are several things that can be done to help revise them such as:

- Clarifying the “so what” portion of the statement.
- Clarify the type of work.

- Ask the question, "...and then what?"
- Provide a purpose to the goal and the act of the activity supports the goal
- Use a specific career focus

One of the intended outcomes of the mentorship process is to empower young people to achieve and have a sense of purpose. Without purpose, the individual may be taking an unnecessary career action and wasting time and effort while doing what was expected by others rather than what he/she needs or desires to do.

The mentor must revisit the mentee's personal vision statement with the mentee periodically. Revisiting the vision statement reinforces and internalizes the vision statement with the mentee. The mentor may need to assist the mentee, especially younger mentees, in writing the vision statement, but the final product must be the mentee's words and effort that creates the statement. The mentor may have to start with a poorly written vision statement simply because the mentee has no clue what he/she wants to do after high school. Mentors should maintain a positive, patient, and encouraging attitude as the mentees learn how to write their personal vision statement.

The Professional Line of Effort

Purpose of the Professional Line of Effort.

The purpose of the professional line of effort is to synchronize and visualize professional planning requirements so that mentees can annotate, understand, and sequence professional ambition prerequisites. The professional line of effort

encapsulates what the mentee wants to do or be and includes educational and work requirements. The timeline and structure of the visualization tool helps students sequence necessary actions and focuses their efforts as they pursue their professional ambitions. Students use the professional line of effort during their research of their intended profession so that necessary actions can be sequenced onto a timeline. Once completed, students can understand requirements specific to their chosen profession and make sure the necessary actions align with their initial thoughts of their chosen profession.

How to Create the Professional Line of Effort.

Creating a professional line of effort requires some time researching a profession and aligning many prerequisites onto a timeline. As a way of making the professional line of effort a manageable task or to just begin inputting data into the professional line of effort, the mentee should start filling in current high school classes on the professional line of effort.

Templating Educational Requirements Beyond High School.

Identify the high school graduation date or at least template the mentee(s)'s graduation using an educated guess. This is an important context for the mentee. Having a future date that is specific, such as Saturday, May 10, 2025, means the mentee knows there is a finite amount of time remaining in high school and that he/she is working to a known, and templated end date. Another reason for the mentee knowing the date is so that he/she can confidently inform family and friends when he/she should graduate. The mentee projects confidence, to himself/herself and

others, by simply knowing his/her graduate date. Graduating high school is an event in the American culture that signifies a transition from childhood into adulthood so placing the date on the timeline personalizes the event and establishes a major accomplishment and achievement beyond educational achievement.

Establish the Academic Time Periods.

Begin establishing and delineating academic school years by identifying the academic year until graduation along the timeline. This could be as simple as identifying the start and end of each school year and labeling a timeframe as the school year, i.e. “SY” and the two-digit associated years. The mentee should create a line on the visualization tool that identifies the educational effort. Typically, a line could either extend from August to May or June with a break during the summer months. This simplistic establishment of time is very effective for high school students who are taking classes that span an academic year. Another method is to break the school year into specific semesters and labeled for clarity. This could include the fall, spring, and/or summer academic timeframes. Dividing the academic year into semesters or quarters is especially helpful for students taking classes that do not span an entire academic year. This format is especially effective for collegiate students templating various credit hour academic loads.

Labels can be simply freshman, sophomore, junior, and senior; SY21-22, SY22-23, SY23-24, SY24-25; or Fall '22 and Spring '23, or any combination or other abbreviation that succinctly and accurately identifies the designated timeframe. Students should use a label name that is short, understandable, and comfortable to

use. For individuals templating collegiate classes, placing the number of credit hours accounts for the necessary credit hours per semester to graduate within a specified timeframe. The professional line of effort can be filled in with high school academic years colored in one color and higher education semesters colored in another (See Figure A1).

Begin by identifying the state mandated, high school, graduation requirements followed by the optional or elective classes. Do not list these on the template. These will become supporting documents. Some high schools utilize a graduation credit tracking system.

All the required high school classes are annotated onto the High School Credit Tracker (See Appendix B). This ensures the successful completion of mandated testing, documents class completion, forecasts future classes, and templates other requirements identified for graduation. This tracker creates a single document to monitor the progression and completion of requirements as students meet the necessary graduation prerequisites.

The Undergraduate Credit Tracker (See Figure A2) can be used to create a checklist to complete an undergraduate degree. When students organize degree requirements in a way that aligns with their timeline the students can understand academic requirements in the context of their plan and the organization facilitates decision-making to keep the student aligned with his/her personal vision. This level of detail empowers the mentee to understand academic requirements and proactively work with school counselors or academic advisors to assist the student in the

completion his/her academic goals. Figure A2 highlights the identification of a decision point. The plan indicates a problem in a need for the student to complete four additional courses to graduate on time. The mentee could possibly extend his/her time to complete the desired degree, alter the plan to incorporate additional classes into the spring and fall semesters, take classes during the summer or winter breaks, or change his/her major to satisfy another degree timeline. This degree of analysis can enable the student to organize the necessary required actions, tailor the academic requirements for graduation, and focus attention towards an identified problem.

Figure A2

Undergraduate Credit Tracker

| CLASS REQUIREMENTS | PLANNED FOR | REQUIRED | PREQUISITES | |
|---|-------------|----------|---|---|
| ECON 201 Principles of Macroeconomics | Fall 2021 | | None | SPRING 2021 |
| BBA 295 Business Communication | Fall 2021 | | | CIS 211 Software Tools for Business |
| CIS 211 Software Tools for Business | Spring 2021 | | | MKT 204 Marketing |
| MKT 204 Marketing | Spring 2021 | | | BBA 261 Business Law and Regulations |
| MNGT 201 Principles of Management | Fall 2021 | | None | ECON 202 Principles of Microeconomics |
| ACCT 281 Principle Financial Accounting | Spring 2022 | | None | MATH 152E College Algebra Enhanced |
| ACCT 282 Principle Managerial Accounting | Fall 2022 | | None | |
| BBA 261 Business Law and Regulations | Spring 2021 | | | FALL 2021 |
| ECON 202 Principles of Microeconomics | Spring 2021 | | | BBA 295 Business Communication |
| CIS 311 Management Information Systems | Fall 2022 | | None | MATH 305 Business Statistics |
| FIN 360 Business Finance | Fall 2022 | | MATH 152, ECON 201, ACCT 281, and ACCT 282 | MKT 340 E-Marketing and Social Networking |
| BBA 315 Quant Analysis for Business | Spring 2023 | | MATH 305 | MNGT 201 Prin of Management Section |
| BBA 350 Business Plan Development | Fall 2022 | | MKT 204 and MNGT 201 | ECON 201 Principles of Macroeconomics |
| BBA 363 Ethical Decision Making in Business | Fall 2022 | | MNGT 201 | |
| BBA 370 Operations and Service Management | Fall 2022 | | MNGT 201 | SPRING 2022 |
| BBA 380 International Business Leadership | Spring 2023 | | ECON 101 or ECON 201 and ECON 202 | BBA 350 Business Plan Development |
| BBA 499C Strategic Management | Spring 2023 | | BBA 315, FIN 360, MKT 204, MNGT 201, CIS 311, and senior standing | BBA 363 Ethical Decision Making in Business |
| MATH 305 Business Statistics | Fall 2021 | | MATH 123 or higher | ACCT 281 Principle Financial Accounting |
| MKT 354 Consumer Behavior | Spring 2022 | | MKT 204 | MKT 365 Services Marketing |
| MKT 365 Services Marketing | Spring 2022 | | MKT 204 | BBA 370 Operations and Service Management |
| MKT 452 Marketing Research and Analysis | Spring 2022 | | MKT 204 and MATH 305 | |
| MKT 495 Marketing Strategies | Spring 2023 | | MKT 204, MNGT 201 and MKT 354, MKT 365 or MKT 452 | FALL 2022 |
| MKT 325 Marketing Ethics and Soc Resp | | Elective | MKT 204 and MNGT 201 | ACCT 282 Principle Managerial Accounting |
| MKT 340 E-Marketing and Social Networking | Fall 2023 | Elective | MKT 204 | CIS 311 Management Information Systems |
| MKT 345 Marketing Strategies Small Business | | Elective | MKT 204 | MKT 354 Consumer Behavior |
| MKT 350 Professional Selling | X | Elective | MKT 204 | MKT 452 Marketing Research and Analysis |
| MKT 375 Sustainable Marketing | | Elective | MKT 204 | MKT 325 Marketing Ethics and Soc Resp |
| MKT 380 Corporate Marketing Strategies | | Elective | MKT 204 | |
| MKT 451 Quantitative Data Analysis | | Elective | SOC 450 or consent of instructor | SPRING 2023 |
| MKT 454 Integrated Market Communications | | Elective | MKT 204 | BBA 315 Quant Analysis for Business |
| MKT 455 Advertising Principles and Proc | | Elective | MKT 204 | BBA 380 International Business Leadership |
| MKT 469 International Marketing | | Elective | MKT 204 | BBA 499C Strategic Management |
| MKT 476 Special Problems Marketing | | Elective | None | MKT 495 Marketing Strategies |
| MKT 339 or MKT 439 | Work Exp. | Elective | | FIN 360 Business Finance |
| BBA 475 Leadership Development | | | | |
| | | | | FALL 2023 |
| | | | | 4 CLASSES |
| | | | | 4 MISSING CLASSES TO GRADUATE ON TIME |

Friction point of four missing classes that prevents graduation on the desired timeline.

To make the plan personal and relatable, the mentee should add his/her birthday to the professional line of effort by indicating how old he/she will be each birth month. This personalization, the mentee's age and sometimes colored in blue or pink, puts the mentee's accomplishments in perspective relative of the mentee's age and reminds both the mentor and mentee to template age-specific requirements. Some examples of age-specific requirements are getting a driver's license, registering to vote, and registering for the Selective Service. During the creation of the visualization tool, mentors and mentees should identify friction points, opportunity points, and decision points. Friction points are problem areas. These can be simple problems of scheduling for the ACT in consecutive months or more significant problems of having overlapped sport timeframes or realizing a very important application timeframe occurs at the same time as another significant event. Opportunity points are good situations. These are timeframes that give the mentee some options. A good example is identifying a spring sport or spring activity for a mentee that typically plays fall sports. The possibility of adding a spring activity may bolster a resume, fulfill a requirement, or become a good place to schedule a difficult class or classes. Identifying opportunity points allows the mentee to utilize their time fully or consciously create an easier schedule. It may be important for the mentee to plan for additional free-time or not being quite so busy due to his/her obligations and requirements.

Decision points are situations that require the mentee to make a deliberate decision. These are identified with a numbered star on the visualization tool. Star symbols are easy to see on the visualization tool and inserting a number helps to identify all the decisions as the entire mentoring tool is created. Decision points require information. Decision points can be templated even if there is no information available to make the decision yet. Decisions should be projected onto the timeline so that the mentee can visualize when the decision is needed and

what specific information is required to make the decision. As the mentor, reserve these decision points for the most major decisions and not minor ones. For example, have the mentee prepare for a decision to attend a university or decide between employers. A decision point is not templated for items such as what date to take the ACT or SAT. Once the mentee places the decision point star on the timeline to identify when the key decision(s) must be made, place the essential decision question in a convenient place at the bottom of the visualization tool under the financial line of effort. You should create a running list of decision questions that correspond to the decision point number. Number your decision points to identify each and this list will document or track progress and decisions over time.

Templating Educational Requirements Beyond High School.

If the mentee expresses a desire to go to college or the personal vision statement requires the mentee attend additional education, begin templating education-specific items on the template. These items can vary depending on his/her identified program. Begin backwards planning by working from high school graduation or a program start date backwards so that important dates are documented onto the template. During the research efforts, any information that is searched and utilized should be documented and referenceable, i.e., websites for identifying testing dates should be saved. Online web addresses can be copied from an internet browser and saved in a computer program such as Word, Google Docs, Excel, or Google Sheets. The following are recommended items to research and place into the professional line of effort:

- Look up and template standardized testing such as the ACT, SAT, MCAT, or other tests. It becomes important to know when registration cutoffs are as well as testing dates.

Mentees should consider study timeframes and may include these on the timeline.

- Look up college admissions or technical school admissions timelines and template them onto the professional line of effort according to the date. Each university or school should have an application timeline as well as an anticipated notification of acceptance. Templating the application timelines for multiple universities according to the date on the timeline helps to focus and prioritize the application efforts and reduce stress levels by providing predictability. The visualization of these timeframes may assist the mentee in identifying when to make a decision and where to place the decision point star on the visualization tool.

- Look up the requirements for and template when to complete the Free Application for Federal Student Aid (FASFA) at <https://studentaid.gov/h/apply-for-aid/fafsa> (Federal Student Aid, n.d.).

If your mentee desires to begin a technical program or other certification, the details must be researched and templated. Many of these technical certifications have limited offerings. Occasionally, certification programs begin during atypical times that do not directly coincide with typical higher education institutional timelines. An example of an atypical start timeline is a dental hygienist program that begins the summer immediately following high school graduation. Individuals who fail to submit their application or are not selected for the program typically must wait a year for the next class cohort to begin.

Most higher education undergraduate bachelor's degrees require 120 credit hours to graduate. It is essential to template enough credit hours per semester to graduate at the intended time. Typically, students must take 15 credit hours each semester so that the student graduates on time with his/her desired degree. If the student is pursuing a minor in addition to his/her major field of study, those classes must be templated as well. This can be difficult especially if the university only offers certain classes during specific semesters, but the template can assist the

student by accounting for the other required classes which tends to make class registration easier for the student.

Templating Work Requirements.

Templating work requirements can mean the mentee needs to template part-time work occurring concurrently during high school and/or templating work after the student's education is complete. If the mentee is unsure to pursue higher education or to begin work, the mentee should identify the point on the timeline where the decision must be made with a star with a number in the middle. There could be multiple decision points for the student, so numbering the decision aids in understanding what each decision will support and to ensure that all the identified decisions are appropriately and individually addressed. The decision numbers assist in labeling the decisions and do not represent a prioritization or severity associated with the decisions. Subsequently identified decisions are simply added to the running list of necessary decisions. The mentee should write a decision question to identify what the decision addresses and then template opportunities to consider later more completely. For many questions, the mentee may know that a decision is required but not have the relevant information needed to make the decision. By having the mentee write out the question, and possibly what is needed to answer the question, the mentee can focus on the right question to answer and be aware of needed information requirements so that when it is time to answer the question, or when the information to answer the question is available, the mentee will have the necessary information.

It is important to template start dates for part-time work similarly to how educational efforts were identified. Placing a part-time job or jobs on the professional line of effort with the educational activities helps to remind the mentee their primary responsibility is to their educational efforts and how their part-time work impacts other aspects of their life.

The mentee should template any job requirements, such as application times, job interviews, resume development, background checks, and/or the notification of references. Mentors can assist mentees by helping to identify realistic job hunt timeframes and answering questions about how to begin their professional endeavors.

Presenting the Professional Line of Effort.

Completing the professional line of effort is a significant achievement. The mentee composed a personal vision statement, identified a professional career, visualized himself/herself as a working adult in a specific career field, and researched and templated professional prerequisites to achieve a professional desire. Mentees who accomplished this line of effort should be congratulated on this achievement considering many American adults assign a personal identity of who they are based on what they do.

Mentees should present or brief their plan to a small group of people to proclaim and authenticate the initial completion of the professional line of effort. The small group could be a school counselor and the mentor or an administrator and key teachers or all the mentor's collective mentees. The mentor should have each mentee orient the audience to the plan by identifying this is a working draft of the life-plan focusing on the professional line of effort with a timeline progressing at the top. The mentor should have him/her explain the personal vision statement and highlight several key items templated on the visualization tool. The mentor should have the mentee close the presentation with a review of the important, identified decision points and ask if there are any questions. The whole presentation should be complete in a few quick minutes followed by comments and questions from the audience.

The presentation of the professional line of effort reinforces to the mentee that his/her plan is a good plan, that the mentee knows and has internalized essential elements of the

professional requirements, and it elicits observations and questions from others. This presentation is also practice for the mentee prior to his/her interactions with close family members and friends. It is essential for the mentee to have and project confidence in his/her plan to close friends and family members since those individuals typically provide the most support and encouragement for and to the mentee. This presentation is a rehearsal for proclaiming professional desires to an expanded support group of the mentee's family and friends.

Mentees should be encouraged to have a conversation with someone close to them, like a parent or grandparent, who can provide feedback so that the mentee can receive some questions and comments about items templated on their plans. The individual he/she identifies needs to be able to provide constructive feedback. Family and close friends sometimes fail to scrutinize the plan and, as a result, their responses lack any relevancy such as, 'that's nice dear,' or 'your homework looks really good.' These comments are not helpful because they do not push the mentee to align their professional desires to their personal vision statement. Mentees should seek out friends and family members who are willing to provide better comments such as 'is that really what you want to do?', 'you are really talented doing...', or 'I thought you wanted to...' to help drive the mentee to add specificity on their visualization tool. Eliciting comments from close family members and friends is important throughout the creation of this mentorship effort.

The Personal Line of Effort

Purpose of the Personal Line of Effort.

The purpose of the personal line of effort is to identify and template personal desires or important personal events into a consolidated timeline so that the mentee synchronizes, plans, and prioritizes activities in a way that is supportable and realistic. The importance of this effort is to ensure personal activities receive the same emphasis as the professional and financial

elements in templating significant personal events. This effort reduces the chance of important personal activities being tabled as a ‘someday’ event that never gets planned, prioritized, or resourced and never happens.

This line of effort was specifically added after comments and observations of retirees lamenting on desires that were never fulfilled. Some activities such as starting a family, hiking the Appalachian Trail, or traveling to interesting places, require some youthful abilities to complete. For an individual who is retired, the lack of professional requirements affords time to enjoy personal activities, but age, ailment, and physical stamina may preclude full enjoyment of the desired personal activity. For a young adult, the sequencing of major life activities may conflict with financial abilities or professional requirements. This section is intended to identify desired activities, or bucket list items, that mentees envision and template them along their timeline. This line of effort is the shortest and least intensive line of effort because the mentee’s imagination and personal desires are the only limiting variables, but it serves as a fulfilling list of activities that enriches an individual’s life.

The personal line of effort is situated between the professional and financial lines of effort so that personal desires are deconflicted or planned with consideration to other requirements. Later in the planning effort, these personal ambitions should be supported by financial planning. Often mentees need some encouragement to dream for themselves, and this line of effort captures personally momentous events or actions that help to define what a person is or who the person wants to become

How to Create the Personal Line of Effort.

Mentors and students should begin filling out the personal line of effort in the middle of the template just below the recently completed professional line of effort. The identified

activities may span only a moment of time, or they may span a significant duration, so the symbology needs to become representative of a point event or spanning time like the academic efforts in the professional line of effort.

Mentors should coach and encourage mentees to allow themselves to dream. If the activity is important to the mentee, then the mentee should add the event to the line of effort. Personal, desired activities of all types can be templated into the visualization tool.

Adding Extracurricular Activities.

One of the first and most simplistic events to add to the personal line of effort are extracurricular events. Extracurricular events could be school related, church related, community related, or personal activities that represent what a person enjoys or is involved with. Schools have a wide variety of activities students can get involved. Communities have great activities and opportunities to further develop and broaden an individual. Students should incorporate fall and spring events so that their high school years have additional activities to diversify their activities and interests. If mentors only see academic activities on the visualization tool, then they should suggest timeframes for mentees to consider for adding an activity or activities. This is an example of an opportunity point where the mentee has an opportunity of time to fill with some meaningful activity or event. Opportunity points are typically identified by a lack of activity templated onto the visualization tool. Empty space is acceptable, but it may be indicative of a timeframe that could be better utilized. A friction point is identified if there are conflicting items on the personal line of effort that overlap or could cause the mentee to pick-and-choose which activity to do. Friction points may look like overlapping or simultaneously occurring activities that overload a specific timeframe. The friction exists because the mentee must prioritize one activity over another. Friction points may

be inevitable, and the mentee may have to juggle multiple activities occurring at once, but this should only happen for a finite amount of time so that the mentee is not over-scheduled or over-stressed for a prolonged period. An example could be playing in the marching band while playing on the football team. It is very difficult to play the football halftime band performance when the coach needs to give guidance to the team. It may be possible for some football players based on their positions to do this, but the mentee should commit to one or the other activities.

Team-based sports in the fall and in the spring are excellent activities that encourage fitness and interpersonal interactions and are sequenced to intentionally not overlap. School sporting activities typically fit neatly within the confines of the semesters. If mentees are interested in sporting events, the requirements should be templated onto the visualization tool.

High schools include various club organizations that interest students from a wide background of perspectives. If the mentees are interested in clubs of any type, the activity should be included. Some clubs have a culminating activity, such as the French Club traveling to France. If there is some very specific activity, place that activity in proximity to the club but include it as a separate event. The separation of a major activity, such as international travel, could have financial requirements and professional considerations.

High school student government activities could be considered either professional or personal activities. It is recommended to place student government activities in the personal line of effort to delineate it and highlight it from the professional requirements. Label the activities in an abbreviated but easily understood manner.

Churches tend to have programs and opportunities for students in the form of youth groups or other groups. These may intentionally schedule activities to not conflict with school schedules or school activities. Summer and weekend activities may provide good activities that

enhance life and provide direction and purpose. Mentees should template these activities to ensure they remain as a focused priority.

Communities may provide opportunities for mentees. Great community activity examples are bands, symphonies, theaters, fishing derbies, agriculture clubs, scouting, and other organizations specifically designed to challenge, develop, and mentor young people. These activities should be accounted for and added onto the visualization tool. The mentees should highlight and template specific highlights such as traveling with a band, achieving a scouting award, performing in a community play, or competing in an agriculture competition onto the visualization tool. These are activities that have the potential to broaden the mentees' interests or possibly become a passion and profession.

Add Travel.

Once clubs, sports, and student government activities are included onto the visualization tool, consider travel events to locations that are important to the mentee. Many mentees could simply want to indicate a generic 'travel' event, but it is very important to be precise and include a specific location to travel. If a mentee desires travel, the travel should include the destination so that time, money, travel modes, and other considerations are included into later planning.

Many students, especially individuals in their senior year of high school, consider a gap year that includes travel to unspecified locations, work, or an effort to 'find yourself.' The freedom of setting off into a random direction full of passion to explore and discover new places is intoxicatingly liberating, but youthful passions delaying life-fulfilling actions undermine the timely pursuit of a well-planned youth. Instead of templating large blocks of generic time to 'travel' or 'find yourself,' have the mentees get specific in their planning. This identification of where the mentee will be, compared to the professional line of effort and later financial line of

effort, could become a friction point, opportunity point, and/or a decision point for the student to evaluate with additional details and information following the financial line of effort. By delineating the specific events onto the visualization tool, the student can evaluate the activity, in part when the personal line of effort is completed or in whole when the visualization tool includes all three completed lines of effort.

Add Important Activities.

Students who are reluctant to participate in extracurricular activities should be encouraged to research educational grant and scholarship prerequisites. This research, which is intended for the financial line of effort, is especially important for individuals who resist extracurricular activities and is especially helpful for mentees early in high school. By evaluating post-secondary education grants and scholarships, especially those that emphasize school involvement, or whole person indicators, students understand the value of participating in various activities and having progressively important roles or positions throughout high school. Once students understand that some grants and scholarships consider volunteer hours, high school sports or team involvement, or leadership of clubs or organizations, their desire to participate in high school activities generally increases. Visualizing extracurricular activities on the personal line of effort formalizes the participation and encourages support from family and friends as well as encourages persistence in continuing with the activity throughout the semester or year.

As mentees gain confidence in templating personal events onto their visualization tool, their activities become more personalized and unique. A student may want to build a boat or learn to fish or read a specific book or ride a horse. As the mentees add more personal activities, he/she should be able to visualize the joy of fulfilling personal goals and activities.

In a similar manner with the professional line of effort, as the mentee begins identifying and chronologically positioning activities onto the visualization tool, the mentee and mentor should begin to identify friction, opportunity, and decision points. For example, if the mentee wants to hike across Spain with his best friend throughout August, but his friend is headed to college with a fall start date in mid-August, the mentee must make a deliberate decision. The same method of identifying decision points with numbered stars allows the mentee to visualize what the situation is, identify what required information is necessary to make the decision, and when a decision must be made.

Mentees should realize the numbered decision points begin to get out of time sequence, i.e., decision point three may need to be answered long before decision points one and two. The stars on the visualization tool helps the mentee understand when he/she must make decisions, and the numerical value aids in identifying the decision question. The mentee could answer questions out of numerical sequence due to when decision points were templated onto the visualization tool.

Typically, summer breaks become excellent opportunity points for students. Mentees should consider summer plans and establish goals and activities. These goals could be simplistic such as templating a family vacation or more challenging such as developing weekly activities. The identification of the opportunity point allows the mentee to visualize blank space and template how to best utilize the time.

Presenting the Personal Line of Effort.

The final product for the personal line of effort presentation includes a review of the personal vision statement, the professional line of effort and the personal line of effort. Mentors

can see what the mentee wants to be or do, what professional requirements or prerequisites are planned, and what personal ambitions are desired and templated.

The mentee should present their information to a small group in a short presentation. The small group should readily understand the abbreviations with little to no explanation. The small group should be allowed to ask questions with the mentee explaining specific actions or requirements with little effort and few notes. This final presentation is the formal process and final event for completing the personal line of effort.

During this second public presentation, the mentees tend to become more confident in orienting the audience to their plan, identifying and explaining their vision statement, highlighting and discussing their professional line of effort, and revealing personal desires templated onto the timeline. Similarly, to the previous presentation, this event is a rehearsal for the mentee to be able to project confidence and clarity for when the student discusses his/her personal plan to family and close friends.

The Financial Line of Effort

Purpose of the Financial Line of Effort.

The intended purpose of the financial line of effort is to provide a visualization of the financial obligations and desires compared to the professional and personal lines of effort so that the mentees have a realistic understanding of financial impacts that support their overarching ambitions. Mentors must provide guidance and insight so that mentees have a functional and realistic perspective of budgets, costs, assets, liabilities, incomes, and expenses depending upon the mentees' level of financial understanding. This line of effort is completed when students present their research on financial requirements and evaluate the financial prerequisites for their chosen professional and personal ambitions. The mentee's final presentation associates realistic

financial fluctuations along the timeline progression and highlights possible successes or failures of planning with respect to professional and personal ambitions. The analysis of the financial line of effort ensures the holistic plan is viable, realistic, personally fulfilling, and financially sound.

The financial line of effort impacts professional and personal ambitions. It is an important line of effort and an area that may be woefully overlooked by educators and parents or guardians due to personal financial stigmas and financial illiteracy or societal hesitations about discussing financial matters. A 2016 study by Standard and Poor's concluded only 57% of adults in the United States are financially literate (Klapper et al., 2016). The study identified people who are financially literate can "make informed financial choices regarding saving, investing, borrowing, and more" and that "financial literacy also sharply increases with educational attainment." The trend in financial literacy is negative with 66% unable to answer basic financial questions in the 2022 National Financial Capability Study (Fernando, 2023; FINRA Investor Education Foundation, 2022). Only seven states, Alabama, Mississippi, Missouri, North Carolina, Tennessee, Utah, and Virginia, "require high school students to take at least one semester of a personal finance course before graduation," and four states, Florida, Nebraska, Ohio, and Rhode Island, "have all recently passed laws making personal finance courses a graduation requirement for high schoolers" (Smith, 2022). These 11 states each individually developed or are developing curricula to improve financial literacy with high school students, which, when combined with the mentoring aspect that personalizes the financial implications commensurate to the professional and personal ambitions, enhances the significance of educational instruction by making materials uniquely attuned to the mentee.

The financial educational requirements paired with individual mentorship has the potential to assist mentees as they make decisions about their immediate and long-term future planning by aligning personal ambitions to financial obligations and desires. Due to widespread lack of financial understanding throughout the U.S. population, the mentor may have to provide financial instruction. According to a Forbes.com article about student debt statistics, all age groups are represented in the amassed \$1.75 trillion U.S. student loan debt (National Center for Educational Statistics, 2018). Shockingly, 14.4 million individuals between 35 to 49 owe more than \$620 billion in student loans and 2.4 million borrowers aged 62 or older owe \$98 billion in student loans (Hahn & Tarver, 2022). The additional mentoring effort further personalizes financial education to support effective decision-making. By enabling the mentee to compose a realistic plan, the mentee can visualize, understand, and influence all aspects of their professional, personal, and financial desires before becoming entangled into the responsibilities and demands of adult life.

How to Create the Financial Line of Effort.

The initial effort in creating a visualization of the mentee's financial line of effort is identifying what the mentee understands about financial concepts. Some, if not most, financial concepts and terminology are foreign to mentees. The mentor should establish an understanding of savings, interest, expenses, and incomes and then build into more advanced financial topics in subsequent interactions with the mentee.

The financial line of effort includes money-related items which initially manifest as anticipated expenses or incomes. The mentee should add items onto the visualization tool to include both major expenses and saving and/or investing goals. It is very important to incorporate a SMART objectives concept in adding items to the visualization tool. SMART

objectives is an acronym for Specific, Measurable, Achievable, Relevant, and Time-bound (Herrity, 2022). If the mentee fails to add SMART objective specificity and have actual dollar amounts identified to the financial aspects of his/her plan, the plan could lack the necessary detail required to enable effective decision-making and the plan becomes less of a holistic action plan and more of a wish-list of uncoordinated, independent dreams.

The mentee should begin to template a savings goal using the money he/she currently has, even if the starting value is zero, and then template income along the already established timeline. The mentee may have several streams of income, and it is important to evaluate all aspects of income that can contribute to achieving the savings goal. Income types may be from part-time employment, gifts, annuities, inheritance, interest payments, or investment maturity, and each mentee should evaluate relevant anticipated income. To determine the monthly savings, the mentee may need to separately create a budget to differentiate and identify income.

For many high school and college students, income is generally represented by compensation from a part-time job. Students may be able to forecast minimum wage increases into their income estimates. In 2021, Florida voters approved a state constitutional change to raise the minimum wage to \$15 per hour by 2025 and templated an incremental increase of one dollar per year on October 1 of each year until the minimum wage reached \$15 (United States Department of State, 2021). By templating the wage increase, mentees have additional insight into when they should achieve their goal(s). Likewise, any known anticipated income should be templated on the timeline and calculated into the achievement of the savings goal.

Mentors can and should teach mentees about taxation if the mentees do not already understand income, capital gains, and sales taxation. Mentees should know how their pay, or future pay if they are not currently working, should be taxed. Depending on the location, income

could be taxed at the federal, state, and/or local levels. Mentors should also discuss the annual need to file taxes. For many young people, the idea of taxes is relegated to sales tax on purchases and springtime tax returns adults talk about and stores marketing efforts target. The mentor-initiated discussion on taxes could likely be the first-time mentees consider having to pay taxes or have taxes withheld from their income.

The financial line of effort is intentionally extended beyond the typical four-year degree horizon to assist with decision-making and understanding the impending financial consequence for achieving the identified personal vision. It is important to evaluate and forecast the potential income from the chosen profession while accounting for personal desires beyond completing the educational prerequisites. The extension of their planning to five or more years reinforces financial education and personalizes the significance of their decisions. Mentees should research potential, creditable income ranges specific to their chosen profession through internet searches to template possible income. These searches should be realistic and specific to the mentee's desired location and ability or experience level. This research helps to justify and visualize the return on investment of the education or training. The mentee should see an increase in income due to completing occupational training or completing a degree. This analysis and depiction on the visualization tool facilitates discussions between the mentor and mentee and has the potential to either reinforce occupational or personal decisions or force a reevaluation of the other lines of effort to ensure the identified ambitions are realistic and accurate. Mentors should investigate realistic income for their mentees' professions to ensure the mentees accurately researched the possible income from the chosen profession.

Many mentees may identify the purchase of a car as a major event worthy of templating onto their timeline. Students may link the attainment of their savings goals to a car purchase.

Mentors should assist mentees with templating the vehicle price as well as other anticipated, car-related expenses such as insurance payments, fuel costs, maintenance costs, parking fees, and registration fees. The mentor can help the mentee to understand the totality of vehicle ownership through an evaluation of the vehicle purchase.

For students who anticipate going to higher education following high school or college, they should begin templating tuition payments along the timeline. Mentees should forecast expenses for the duration of their education to coincide with their educational timeline in the professional line of effort. Universities typically require tuition payments in full- or in partial-payments during the fall and spring semesters. Having mentees template their university cost, or forecasted cost, can be a sobering realization of the cost of education for the mentee, mentor, and parent or guardian. When mentees template the actual dollar-value of tuition expenses by semester, they begin to identify the need for scholarships, grants, part-time jobs, and incrementally paying for tuition bills. Each university publishes a calendar that identifies when tuition must be paid. Mentees should identify when their university or possible universities require payment and template that amount onto the visualization tool.

If mentees utilize educational loans, mentors should have the mentees template the repayment start and end dates with anticipated monthly payments. The approximate monthly payments can be calculated using an amortization table. The specific dollar amount or an educated approximation and start timeframe helps mentees to visualize their financial obligations following their higher education graduation. Likewise, individuals who utilized other programs that have obligations following graduation should template their obligations. Some examples of opportunities that may have time-specific requirements may be military service, educational loan repayment by working as a teacher in some states, or working as a large animal veterinarian in

underserved communities. If these obligations are not templated, other life challenges such as moving to and starting a new job, being financially independent from parents or guardians, or starting personal events such as marriage or travel may cause additional financial stress and friction on the individual.

As mentees gain understanding and confidence, mentors can encourage the mentees to template a time to apply for a credit card or start a Roth Individual Retirement Account or template educationally related actions such as when to apply for the Free Application for Federal Student Aid (FAFSA), scholarships, and grants for higher education or technical degrees or certificates. Like information posted into the other lines of effort, abbreviate the information to form a visualization so that the information does not clutter or overwhelm the visualization and decision-making.

As the financial line of effort is filled in along the chronological format, it is very important to periodically assess the realistic abilities of the mentee compared to the identified professional and personal goals. It is very likely that mentors and mentees identify friction, opportunity, and decision points. There could be many of each category. The placement of information onto the visualization tool allows the mentor and mentee to understand the second- and third-order effects of how each item may or may not impact the other lines of effort. This visual organization allows the mentee to understand how each action impacts other areas of his/her life and enables the mentee to make informed decisions.

Friction points represent a problem on the visualization tool. Friction points are not negative, but their identification typically means some action or change is warranted. Unlike friction points between scheduling personal and professional events, friction points between the other lines of effort with the finance line of effort most likely leads to a decision or need for a

decision. Friction points in the financial line of effort are typically identified by a lack of financial ability to achieve or complete an item on another line of effort. For example, if assets or income are insufficient to meet or exceed an identified savings goal, then the goal, either in value or date, must be altered. Likewise, if there are insufficient college savings, a decision must be made to either obtain loans, grants, and/or scholarships, or the option of going to college or attending a specific university may need to be reevaluated.

Opportunity points on the financial line of effort represent a financial win or positive action. An opportunity point may necessitate a decision, but action may or may not be needed immediately based on the circumstances. For example, if a mentee receives a full-paid scholarship to a university, his/her 529 College Savings Plan may need to be liquidated or utilized differently than originally anticipated, such as for a master's degree or other higher education that was not initially forecasted. An opportunity point could be a financial windfall such as the sale of an asset or receipt of an inheritance that may alter and enhance the mentee's plan or it may alleviate some struggle or friction along the timeline.

Decision points are specifically identified timeframes that require a decision. To minimize clutter on the visualization tool, the mentee should only template significant decisions. In a similar manner to the professional and personal lines of effort, decision points are templated using a star with a number inside the star. As the mentee progresses in filling in the visualization tool, the decision point numbering may not neatly align so that as the timeline progresses the decisions sequentially follow each other. The mentee may have several decisions with each line of effort, possibly three to five each, so maintaining organization is important. Once the mentee begins filling in the visualization tool with financial data and comparing the lines of effort along the timeline, the mentee can begin visualizing critical timeframes impacted by the need for

money, the lack of money, critical expenses, or other areas where the financial wellbeing impacts the professional and personal lines of effort. For example, a mentee may identify a need for a decision between a desire to work a part-time job after graduating high school to accumulate money to pay for tuition and other educationally related expenses or pursue a loan to pay for educational expenses. The mentee may not have sufficient information to immediately make this decision, but the mentee could position a decision point onto the visualization tool and then template data for both possibilities to visualize what his/her life would be like along either of the potential courses of action.

Many of the previously identified decision points in the professional and personal lines of effort will be supported by the financial data. When the mentee can build a realistic visualization of what his/her financial abilities or limitations are, the related items placed on the other lines of effort gain additional clarity and they may be considered realistic or unrealistic. For example, a mentee may have a professional goal to become a doctor and may have been accepted into a reputable medical school, however, the personal ambitions desiring to not have educational debt and the lack of other financial abilities may make the mentee evaluate other options to pay for medical school that may have never been considered previously. Options such as military service or governmental opportunities or nonprofit organizations may offer options to pay for or offset the cost of the medical school. Those opportunities may never have been considered previously without the visualization tool's assistance in holistically assessing the ambition of going to medical school to become a medical doctor.

Presenting the Financial Line of Effort.

The final presentation following completion of the financial line of effort is a cumulative review of all the data that the mentee templated onto his/her visualization tool. The mentor

should invite other key counselors, other mentors, and parents to serve as the audience for the mentee presents to. The audience should be larger than the other updates, but remain small and manageable so that questions and discussions happen without fear or embarrassment. The goal of the presentation is for the student to confidently present the plan beginning from the personal vision statement completely through to the financial line of effort. The mentee should cover all three lines of effort and discuss the identified friction, opportunity, and decision points so that the audience understands what was or is being considered as future possibilities. The audience, with their various perspectives, should provide insights or perspectives for the mentee to consider. When the presentation is complete, the mentee may make additional changes. Changes are expected and should be encouraged by both the mentor and mentee. This plan serves as a guide, and it is not intended to stifle life events or opportunities. Examples of major life changes are mentees moving for professional opportunities that were not templated, mentees starting families sooner or later than templated, or mentees experiencing an unexpected financial windfall or hardship. Mentees should better understand their resiliency and that they are capable of authoring and re-authoring their own path to achieve their aspirations regardless of challenges or changes.

Evaluation of Mentees Use of the Visualization Tool

Based on the task hierarchy, the primary performance objectives that mentees must be able to complete are:

- Students will develop a one-sentence personal vision statement.
- Students will research professional requirements that support professional ambitions, including educational and work-based experience prerequisites.
- Students will template professional events onto a timeline.

- Students will conduct introspection to develop personal ambitions.
- Students will research personal requirements that support personal ambitions.
- Students will template personal events onto a timeline.
- Students will create a financial budget.
- Students will research financial impacts and requirements associated to the professional and personal ambitions.
- Students will template financial events and goals onto a timeline.
- Students will present their plan to their mentor.

Task Sequence

Each task associated with this mentorship effort is sequential and is intended to build a visualization of the student's overarching ambitions. Students worked to develop each line of effort prior to progressing to limit stress and to focus attention and research. The learning tasks below are identified by line of effort. The evaluation rubric, Appendix D, provides a simple "Go or No-Go" checklist to ensure students and mentors discuss all the required topics, organize information, and document progression of mentoring tasks.

- Learning Task 1: Students create a personal vision statement into one, preformatted sentence: Mentors must be able to assist students to utilize the predetermined format of, "I want to..., so that..." to help students develop concise vision statements.
- Learning Task 1.1: Students place their personal vision statement onto a multiyear template. Mentors need to be able to assist students to personalize their plan while leveraging the planning template.
- Learning Task 2: Students research requirements, both educational and experiential, that supports the professional ambitions identified in the personal vision statement. Mentors

must create the conditions that enable students to want to explore various employment or career options. This is most effectively done through focused attention on the student's identified desires. Mentors that demonstrate a sincere focus on student ambitions tend to elicit the best student results.

- Learning Task 2.1: Students create a reference sheet to document research information: Mentors must be able to emphasize the importance of utilizing quality source materials that support the student's ambitions. Essential information is important to have readily available to support student actions.

- Learning Task 2.2: Students template professional requirements onto their multiyear template: Mentors must be able to guide students to input their actions onto the standardized format. This effort includes the creation of abbreviations and may have multiple possibilities or branch plans if the student is unsure or hesitant to commit to one professional ambition.

- Learning Task 2.3: Students visualize the professional requirements and identify friction, opportunity, and decision points: Mentors must be able to understand the 'so what' or significance of what the student templates onto his/her visualization planning tool. Mentors can assist students to maintain a steady tempo of work requirements so that their efforts are generally consistent throughout the year, and they assist students in pacing their efforts or deconflicting actions to complete their goals.

- Learning Task 2.4: Students present their professional line of effort to their mentor in a short presentation: Mentors must be able to listen to each student presentation to understand and ensure congruence between what the student says and what the displayed information outlines.

- Learning Task 3: Students research requirements to support personal ambitions:

Mentors must encourage students to enjoy and plan for personal activities that round out a full living experience. Students should feel encouraged to dream and then research personal goals.

- Learning Task 3.1: Students template personal requirements onto their multiyear template: Mentors must be able to encourage students to input personal activities onto their planning tool.

- Learning Task 3.2: Students visualize the personal requirements and identify friction, opportunity, and decision points: Mentors must be able to identify friction points that conflict with professional requirements, identify opportunity points that offer time or opportunities to maximize time periods more fully, and identify areas that require decisions.

- Learning Task 3.3: Students present their professional and personal lines of effort to their mentor in a short presentation: Mentors must be able to understand student planning efforts and relate the presented information back to the original student-identified ambitions.

- Learning Task 4: Students research requirements that support the financial ambitions identified in the personal vision statement: Mentors must be able to ensure students know and understand basic financial concepts. If students are uneducated on financial concepts, the mentor should be able to direct and teach the student to complete the financial line of effort requirements.

- Learning Task 4.1: Students create a budget to document their personal financial situation and financial goals: Mentors must be able to assist students in creating a budget.

- Learning Task 4.2: Students template financial requirements onto their multiyear template: Mentors must be able to encourage students to establish financial goals while using realistic calculations and SMART objectives.

- Learning Task 4.3: Students visualize the financial requirements and identify friction, opportunity, and decision points: Mentors must be able to relate financial calculations and analysis to the professional, personal, and financial lines of effort to minimize friction points, maximize opportunity points, and simplify decision points.

- Learning Task 4.4: Students present their professional, personal, and financial lines of effort to their mentor in a short presentation: Mentors must be able to assist students to holistically understand their multiyear planning efforts and have confidence in their planning efforts.

Learning Trajectory Analysis

Student learning and progression is checked in four iterative meetings between the student and the mentor. The verbal assessment is designed so that the student presents a templated plan to the mentor. The mentor can ask questions about the possible friction and opportunity points and discuss information requirements associated with the decision points. Students can incorporate information provided through research or by their mentors into subsequent presentations.

During the creation of the visualization plan, students will progress in their abilities to visualize friction points, opportunity points, and decision points. The deliberate method of researching, presenting, and discussing the plan with others empowers the student to alter the plan to proactively pursue their ambitions.

References

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- Merrill, D. D. (2002). First principles of instruction. *Educational Technology Research and Development*, 50(3), 43-59.

Appendix B

High School Credit Tracker

High School Credit Tracker- 24cr diploma option

Name: _____

Student ID: _____

Current Grade: _____

Date Completed: _____

| Requirement | Semester 1 | Semester 2 |
|-------------|------------|------------|
| English 1 | | |
| English 2 | | |
| English 3 | | |
| English 4 | | |

| Requirement | Semester 1 | Semester 2 |
|-----------------|------------|------------|
| Algebra 1 | | |
| Geometry | | |
| 3rd Math Credit | | |
| 4th Math Credit | | |

| Requirement | Semester 1 | Semester 2 |
|--------------------|------------|------------|
| Biology | | |
| 2nd Science Credit | | |
| 3rd Science Credit | | |

| Requirement | Semester 1 | Semester 2 |
|-------------------------------------|------------|------------|
| World History | | |
| US History | | |
| US Government (½ credit/1 semester) | | |
| Economics (½ credit/1 semester) | | |

| Requirement | Semester 1 | Semester 2 |
|--|------------|------------|
| Fine Art (1 credit/2 semesters) | | |
| HOPE (1 credit) | | |
| Electives (8 credits-tally # of credits as earned) | | |
| Online Course (1 credit) | | |

| | |
|-----------------------------|--|
| FSA Pass | |
| Algebra EOC Pass | |
| Biology EOC | |
| Geometry EOC | |
| US History EOC | |
| GPA (Must be 2.0 or higher) | |

Appendix C

Blank Mentoring Visualization Tool

The blank visualization tool includes the personal vision statement and timeline at the top; the professional, personal, and financial lines of effort along the left; and the decision point questions at the bottom. Mentors and students input the identified data to visualize the multiyear plan. Mentors and students use the visualization tool to identify overlapping events, known as friction points, areas of no information, known as opportunity points, and areas that require a key decision, known as decision points. The information included on the visualization tool should support the overarching personal vision statement.

| Personal Vision Statement: I want to ...so that.... | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N | D | | | | |
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Decision Point 1:

Question 1

Appendix D

Mentee Evaluation Rubric

The evaluation rubric is a simple “Go or No-Go” checklist intended to elicit a discussion about the learning tasks. Mentors and students can utilize the rubric to ensure they discuss all the required topics, organize information, and document progression of research.

| Learning Task | Requirement | Yes | No |
|-------------------|---|-----|----|
| Learning Task 1 | Did the student place the personal vision statement onto a multiyear timeline using the format "I want to...so that...". | | |
| Learning Task 1.1 | | | |
| Learning Task 2 | Students research requirements that supports the professional ambitions related to the personal vision statement. | | |
| Learning Task 2.1 | Students template professional requirements onto their multiyear template. | | |
| Learning Task 2.2 | | | |
| Learning Task 2.3 | Students present their professional line of effort to their mentor in a short presentation highlighting the professional requirements and friction, opportunity, and decision points. | | |
| Learning Task 2.4 | | | |
| Learning Task 3 | Students research requirements to support personal ambitions. | | |
| Learning Task 3.1 | Students template personal requirements onto their multiyear template. | | |
| Learning Task 3.2 | Students present their professional and personal lines of effort to their mentor in a short presentation and identify friction, opportunity, and decision points. | | |
| Learning Task 3.3 | | | |
| Learning Task 4 | Students research requirements that support the financial ambitions identified in the personal vision statement. | | |
| Learning Task 4.1 | Students create a budget to document their personal financial situation and financial goals. | | |

| | | | |
|-------------------|---|--|--|
| Learning Task 4.2 | Students template financial requirements onto their multiyear template. | | |
| Learning Task 4.3 | Students present their professional, personal, and financial lines of effort to their mentor in a short presentation and identify friction, opportunity, and decision points. | | |
| Learning Task 4.4 | | | |

VITA

DEREK J. CARLSON

EDUCATION

| | |
|----------------|---|
| December, 1998 | Bachelor of Arts Mississippi State University Starkville, Mississippi |
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| | |
|----------------|--|
| 2020 - Present | Senior Army Instructor, JROTC Estero High School Estero, Florida |
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| 2003-2004 | Engineering Project Management Specialist Northrop Grumman Ship Systems Pascagoula, Mississippi |
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