Author(s): Hayden, Seth C. W.; Peterson, Gary W.; Reardon, Robert C.; Lenz, Janet G.; Sampson, James P. Jr.; Vuorinen, Raimo; Kettunen, Jaana; Stallings, Erica; Dozier, V. Casey

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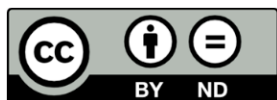
CHAPTER 20
STRATEGIC PLANNING FOR CAREER SERVICES

Seth C. W. Hayden
Gary W. Peterson
Robert C. Reardon
Janet G. Lenz
James P. Sampson, Jr.
Raimo Vuorinen
Jaana Kettunen
Erica Stallings
V. Casey Dozier

Correspondence concerning this chapter should be addressed to S. C. W. Hayden at haydensc@wfu.edu.

This chapter explores strategic thinking, operations planning, and strategic planning as ways to help us anticipate important social and organizational changes so that we may continue to offer timely and responsive career services. In addition, it provides preconditions for career services and the manner in which they contribute to wider employment or societal goals. After

reviewing this chapter, the reader should be able to (a) define strategic thinking and strategic planning, (b) contrast strategic planning with operations planning, (c) describe the six steps in strategic planning, (d) relate strategic planning to cognitive information processing theory (CIP) and to accountability, and (e) describe the four principal roles of the modern career practitioner. This chapter begins with a discussion of strategic planning and the aims of career services and continues with an examination of social trends influencing strategic planning, strategic thinking and strategic planning, why strategic planning is necessary, guidelines for strategic planning based on CIP theory, organizational context and the implementation of a strategic plan, roles of the career practitioners in a CIP theory-based environment, role of public policy in strategic planning, and differentiated service delivery and public policy. The chapter concludes with a summary and recommendations for getting the most benefit from reading the chapter.

Strategic Planning and the Aims of Career Services

At the beginning of the 20th century, Frank Parsons and other leaders of the progressive movement in the United States engaged in "strategic planning," which led to the development of the vocational guidance movement and the beginnings of the counseling profession. Although there is no documentation of their work that is actually labeled strategic planning, the evidence suggests that is exactly what they did. Providers of career interventions, indeed the nation, are still called on to engage in strategic planning regarding social policies and institutions that will enable citizens to work effectively, both at the individual level and the societal level. Camille DeBell (2001) provided a thoughtful analysis of the social conditions in the United States 100 years ago that led to the development of career guidance and counseling. She pointed out that…

> although the world of work is still responding to some trends initiated a century ago (such as globalization, immigration, equity concerns, technological advance), there are also exponential changes, and the world of work is not the same as it was even a decade ago. It is essential that career practitioners in all their varied work environments help clients understand this and prepare for the unpredictable—the twenty-first century of work (p. 87).

This chapter relates the principles of accountability introduced in Chapter 19 to the principles of strategic planning and demonstrates how strategic planning can be used to offer relevant and effective career services in a rapidly changing world. From a strategic planning perspective, the two principal aims of modern career services are to (a) provide learning opportunities to help individuals acquire new knowledge and capabilities that will enable them to become better career problem solvers and decision makers and (b) be responsive to the needs of the clients, organizations, or communities that receive these services. These aims require a continual assessment of both the internal and the external environment of the career services program. Through strategic planning, career service programs will be better prepared to compete for resources, as well as to attain their goals, objectives, and mission.

Strategic Planning, CIP Theory, and a Career Service Mission

A career service's mission statement is a single comprehensive statement that describes the very business of the service which distinguishes it from other services in an organization or from like services in other organizations. It also serves as an organizing principle of a service that keeps it "centered" in maintaining consistency of its services over time. Often, services are called on to incorporate additional services or purposes externally or to add services from

speculation, experimentation, or ambition internally. In either case, the mission statement provides a focus in asking the strategic question, "How does this proposal align with our business?" Strategic planning is a method or process through which decisions to expand, contract, or alter services are made.

An example of a hypothetical mission statement adapted from the [Florida State University Career Center](#) (2023), states the following:

> The Mission of the Career Center at High Quality University (HQU) is to offer state-of-the-science career services to students, alumni and the community reflecting the core teaching, research, and service functions of the university. This mission is carried out through the following purposes:
>
> • Provide comprehensive career interventions,
>
> • Train career service practitioners,
>
> • Conduct life/career development research, and
>
> • Disseminate information about life/career services and issues to the university community, the nation, and the world.

This comprehensive statement, with four primary purposes, was developed through strategic planning that involved contributions of stakeholders who represented practitioners from within the service, clients of the service, university administrators, the state Department of Education personnel, and nationally prominent career practitioners and researchers. The kind and manner in which these purposes are carried out makes the HQU Career Center distinctly different from all other college and university career centers in the world.

The *strategic planning* process, typically carried out approximately every 5 years, begins by asking, "Are we doing the right things in this educational institution or corporation?" This question differs from *operations planning* which asks the question, "Are we doing things right?" The approach to answering both questions is distinctly different in terms of purpose, method, and outcome. Finally, through an effective strategic planning process, a career service is better prepared to maintain its goals and objectives in the midst of distractions and threats and to compete for resources to attain them.

The question now asked is, what is the relationship between strategic planning and cognitive information processing (CIP) theory? In response to this question, there are two principle aims of CIP theory which cut across and are embedded within the four purposes of the HQU Career Center mission: (a) to provide learning opportunities to assist individuals in acquiring new knowledge and capabilities that will enable them to become better career problem solvers and decision makers, and (b) to be responsive to the needs of clients, organizations, and communities that receive the products (or outputs) of these services. Thus, attaining these aims include (1) the delivery of career services, (2) training in how to deliver effective career advising, counseling and instruction, (3) the advancement of research to bring about the desired outputs and outcomes (Peterson & Burck, 1982) of career services, and (4) dissemination of knowledge regarding how these aims are attained. In some respects, the HQU Career Center serves as laboratory for advancing the "state-of-the-science" in helping individuals acquire career problem-solving and decision-making skills.

Social Trends Affecting Strategic Planning

A key aspect of thinking about strategic planning for career services is to consider a broad range of social trends that affect work in this area. This section highlights a selected number of those trends, including the global economy, technology, alternative ways to work, and changing family and work roles. Chapter 21 discusses additional trends that may impact the design and delivery of career services and the evolution of CIP theory.

The Global Economy

The growth of the global economy is illustrated by the emergence of a wide variety of options for persons to work globally. This has multiple implications for strategic career planning. Broadband connectivity, cloud computing and other innovations have greatly expanded growth in the global and digital economy (International Labour Organization, 2021). People have the option to sell their labor through a wide variety of digital platforms, some of which enable them to work in their local community, while others involve web-based platforms that allow for remote work across the globe. While some of these platforms provide attractive, flexible options for freelance or home-based workers with high level skills, others may involve low wages, unpredictable work schedules, limited benefits, and a lack of workplace protections (Blustein, 2019; ILO, 2021). The global economy will continue to rely on so-called "knowledge workers," who know how to allocate knowledge and information to productive use. Careers will continue to unfold in a global context with greater value being placed on value added skills such as flexibility, adaptability, and resilience. These types of skills will be essential as individuals navigate their career journey within a global labor market.

Growth of Technology

Technology continues to change the way many organizations conduct business and provide services, and this can have implications for an individual's strategic career planning (Manyika, 2017; Tang, 2019). For example, in the financial industry, computers are set to automatically move money to and from accounts when certain preset conditions exist. The Internet and other technological advances make it possible for individuals and organizations to have instant contact with one another, at little cost. In addition, it's hard to predict how the advances in artificial intelligence (AI) will impact work and life in the future (Bankins & Formosa, 2023; Kochhar, 2023; Monthly Labor Review, 2022; Stahl, 2021; Zahidi, 2023). In recent years the COVID pandemic further highlighted how technology can be employed to enable individuals to work remotely (Parker et al., 2022), in some cases expanding choices and in others replacing human workers with machines and robots (See Chapter 21 for more on COVID and work). It is virtually impossible to overestimate the impact of technology on careers and the provision of career services. Indeed, the expansion of Internet applications has radically changed the ways in which career interventions are provided to various constituencies. This was further highlighted by the way career services pivoted to remote delivery of counseling, course instruction, workshops, and brief staff assistance (Osborn et al., 2022). The pandemic illustrated how a CIP-theory based approach could be adapted in a virtual format, including the use of CIP theory handouts (Pyramid, CASVE cycle, Individual Learning Plan), assessments (e.g., CTI, CSI, DSW), worksheets (Guide to Good Decision-Making Exercise), and related materials. Access to video conferencing technology (e.g., Skype, Zoom) and course learning management systems (e.g., Blackboard, Canvas) have allowed career practitioners to provide services to

clients and students without the requirement of face-to-face meetings. This has important implications for career practitioners around the globe who may need to reach a diverse array of clients who cannot travel for in-person services.

Alternative Ways to Work

In years past, people often grew up with the idea of working a 40-hour week in their jobs—that just seemed to be the natural order of things. Of course, people in certain jobs (e.g., physicians, nurses, plumbers, police officers) continued to work odd schedules, but many people assumed they would have "regular" weekday jobs. Perhaps nothing else in the career world has changed as much as the way we work, e.g., the "gig economy" (Kessler, 2018; Semuels, 2018), and this has implications for strategic career planning services. Work patterns include options such as flextime, part-time, job sharing, temporary, and home-based work/telecommuting patterns (Reardon et al., 2022). One example of this phenomenon is the proliferation of *precarious work*. This is defined as work that is uncertain, unstable, and insecure where employees assume the risks of employment and receive limited social benefits or protections from employers or the government (Blustein, 2019; Kalleberg, 2012). In precarious work, workers are increasingly defined as independent contractors who handle all the risks associated with their employment. The development of such working arrangements has been influenced by technology and globalization. There are abundant implications for career services inherent in this area of social change.

Changing Family and Work Roles

Gender roles within the family have shifted over time in relation to work (Schultheiss, 2020; Tang, 2019). Women have shifted from focusing specifically on the needs of the home and entered the workplace. Over the past 60 years, women have increasingly taken jobs outside the home (Bureau of Labor Statistics, 2022; Yellen, 2020). In some cases, men have opted to stay at home and devote more time to childcare (Kelly, 2022). The dual-career family, or in some cases the dual-earner family, where both individuals in a relationship are working outside the home, has had a huge impact on the way most of us work today and will work in the future (Reardon et al., 2022). All of the trends noted above point to the need for more complex thinking about how individuals will navigate various life roles and how career practitioners will help them do that. Adjusting to changes in society will require an ability to adapt and be flexible and have a tolerance for various levels of ambiguity. The evidence is clear that CIP theory, 30 years from its "birth," can continue to play a role in helping individuals to develop new schemata for solving career problems and making career decisions as they navigate career and family roles.

Implications

Social trends such as these four will continue to have an impact on the nature of career services. While early literature described how career services could be both high tech and high touch (Pyle, 1985), recent events have illustrated how much can be accomplished without face-to-face interaction. While persons seeking career assistance have a wealth of resources easily accessible 24/7 (e.g., websites, computer-based guidance systems, interactive workbooks, job databases, etc.), there is still a need for career practitioners who can provide assistance in helping individuals navigate the array of information and interventions, as well as serve as a "safety net" for low readiness individuals and those who may be experiencing both career and mental health concerns. See more about this topic in Chapter 10 of this book.

In a comprehensive career center, which typically provides services in a physical location and in a virtual setting via the Web, career practitioners can expect to increasingly encounter clients who may have a strong preference for a particular type of service delivery. There may also be pressure from stakeholders (e.g., government officials, funders) and external groups (e.g., alumni, parents) for more readily accessible services. Career centers may have more staff who work remotely to provide assistance to individuals. This means that all of the career tools used in service delivery need to be adapted for virtual use. We now turn to ways in which career service providers can prepare to respond to these trends and issues.

We believe the four social trends described above will have an impact on the career development of individuals and the offering of career services to assist them (See Chapter 21 for a discussion of additional factors that will likely impact CIP theory-informed services). These trends will compel career service providers to be mindful of strategic questions such as the following:

- What is our business?

- Who are our primary clients?

- What are their needs?

- How can we as career practitioners foster decision-making skills in clients that will enable them to make informed choices as they navigate an ever-changing career landscape and seek to improve the quality of their lives?

- How do we articulate the value of our services to relevant stakeholders?

We now turn to ways in which career service providers can prepare to respond to these trends and issues.

Strategic Thinking and Strategic Planning

Strategic thinking and planning are capabilities career practitioners should possess that enable them to anticipate social and organizational changes that bear on the mission and purposes of a career service. In the conduct of day-to-day practice, these capabilities help maintain focus on important broader issues that may impact the delivery of career services in the immediate and distant future.

Strategic Thinking

Strategic thinking involves the integration of planning, leadership, and management (Cope, 1987; Haycock, Cheadle, & Bluestone, 2012; Omahe, 1982). Strategic thinking raises far-reaching issues such as the following: Are we providing the range and variety of career services that meet the needs of our targeted clientele? Does the career services center mission complement and enhance the mission of the organization as well as the mission of other service providers within it? And related to CIP theory, are our clients acquiring the knowledge, skills, and attitudes (SKAs) that will enable them to be effective career problem solvers and decision makers when faced with inevitable career problems in the future?

Strategic thinking may be further illuminated by contrasting it with the concept of operations planning. Strategic thinking (Ballentine & Watts, 1989) may be thought of as doing

the right things (effectiveness), whereas operations planning may be thought of as doing things right (efficiency). Other contrasts between the two concepts (Cope, 1987, p. 8) are:

Strategic Thinking	Operations Planning
1. Formulation	Implementation
2. What	How
3. Where	How
4. Ends	Means
5. Vision	Plans
6. Effectiveness	Efficiency
7. Strategizing	Planning
8. Risk	Control

Specifically, strategic thinking entails a systems perspective, being intent-focused, thinking in time (i.e., gap between current reality and intent for the future), is hypothesis driven, and characterized by intelligent opportunism (i.e., being open to new experiences) (Haycock et al., 2012).

Finally, strategic thinking involves integrating three components: (a) formulating a vision of the right things to do according to the mission (strategic planning), (b) achieving consensus among stakeholders and acquiring resources to do the right things (leadership), and (c) implementing a plan to do things right (management). Thus, maintaining appropriate career services offered by a program demands that career practitioners, in addition to skillfully providing facilitative conditions and interventions to advance career problem solving and decision-making skills, must also possess the capacity for thinking strategically about the present and future services they will provide.

Strategic Planning

Strategic planning has been described as an ongoing process used by organizations to chart their future direction (Cote, 2020). Opinions vary about the usefulness of strategic planning in turbulent times, but some consider it more important than ever for today's environment (Bryson, 2018). The ultimate purpose of strategic planning is to maintain and enhance the viability of a program in a broader organizational and environmental context; that is, to maintain and even grow its mission and purposes within the organization. From an open-systems perspective (Bertalanffy, 1968; Kabeyi, 2019), strategic planning entails determining a direction of growth and development internal to the program in relation to the forces and direction of change in the near and distal external environment, so as to enhance the position of the program in the inexorable competition for resources in the ecosystem. Further, strategic planning requires a vision of the future, while being mindful of the evolving relationship between the internal program environment and the ever-changing external environment. Often, the formulation of a

vision involves tapping into intuition, opinions, and qualitative information more than information from empirical data used in operations planning. In other words, a vision is created more than derived. Thus, strategic planning requires a forward-thinking and proactive approach to evaluating the existing mission, purposes, and service offerings of a career service program with an eye toward further development in the direction of the vision.

Strategic planning is also an organizational problem solving and decision-making process, and therefore amenable to analysis within the framework of CIP theory. The strategic planning process, as outlined by Bryson (2018), as well as Cope (1987), can be embedded within the CASVE cycle, while the members of a strategic planning task force or committee possess the knowledge and capabilities contained in the respective domains of the Pyramid of Information Processing. Thus, the members possess self-knowledge and organizational knowledge at the base, problem solving and decision-making skills (presented below) at the mid-section, and the chair of the committee provides the executive function at the apex by organizing and leading the group through the process.

Why Strategic Planning is Necessary

Ultimately, as a process, strategic planning serves as a mechanism or means for building consensus (or buy-in) among the stakeholders of a career service program regarding the direction of its future growth and development. Furthermore, the output of the strategic planning process is a document containing the mission statement, goals and objectives for each of the purposes within the statement, and implementation strategies and performance indicators for each objective. This document serves as a foundational resource, guide, and reference for the making of important and even critical decisions regarding the maintenance and growth of a career service. Three examples of uses of a strategic planning process are as follows.

Preparing an Annual Budget for a Career Service

Each year, a career services director prepares an operating budget to be submitted to an administrator in charge of an organizational unit containing the service. The request for funds is based on the need for resources to accomplish the objectives for the coming year as detailed in the strategic planning document. Included, along with the proposed budget, is an evaluation of the attainment of the current year's objectives along with excerpts of the strategic planning document to place the proposal in the context of an overarching strategic plan. Often, the administrative supervisor, typically a dean or vice president in charge of the service has participated as a stakeholder in the development of the strategic plan.

Turnover in Leadership

An unavoidable reality is that career center directors leave their employment for a variety of reasons (Sampson, 2006), including professional advancement, retirement, and burnout. The hiring of a successor can be fraught with challenge and uncertainty. If there is an existing strategic plan, the outgoing director, as a leader, has played a key role in the formulation and execution of it. A new director may have a unique perspective on the assessment of the organization, have a different vision, and view the existing mission and purposes differently than the predecessor, in which case a new strategic planning process should begin immediately upon assuming the office.

Sudden Environmental Changes

The broader socio-political environment at times presents sudden circumstances that require an adaptive response. One example is from the State of Florida, where a previous governor signed into law a statute that the universities of Florida would receive supplemental funding if 60% or more of the baccalaureate graduates of degree programs attained full-time employment in an occupation directly related to their degree within six months after graduation. The Florida State University Career Center was immediately called upon to serve as a resource to assist academic departments in attaining this standard. The response by the Career Center was to engage in a strategic planning process to formulate an array of career services and programmatic interventions to assist academic departments and programs in meeting the 60% employment standard. The offering of career portfolios beginning in the freshman year, the hiring of career liaisons to serve as consultants to department faculty and students in preparing programs of study with appropriate internships, and resume construction and review workshops for students were instituted by the Career Center to address this prioritized organizational need.

These are examples of how strategic planning can serve as a valuable process for enabling career service programs to meet internal and environmental forces and opportunities for growth and development. The integration of continuous improvement approaches with strategic planning makes it easier to maintain a regular strategic focus in a career service organization (Sampson, 2006; Sampson & Lenz, 2023).

Guidelines for Strategic Planning Based on CIP Theory

Strategic planning may be thought of as a systematic problem-solving and decision-making process pertaining to identifying and addressing the most important long-term issues facing an organization and its future. CIP theory offers a conceptual framework, employing the phases of the CASVE cycle, for identifying, framing, and acting on strategic issues beginning with the Communication phase and ending with the Execution phase as described below.

Communication

There are two components to the Communication phase with organizations, the (a) organizational assessment and (b) visioning.

Organizational Assessment

As in the use of CIP theory with individuals, the Communication phase entails becoming fully in touch with broad and relevant aspects of organizational functioning and behavior, often referred to as *organizational assessment*. A strategy for assessing an organization is to thoroughly and critically examine its strengths, weaknesses, opportunities, and threats, (Benzaghta et al., 2021; Sampson et al., 2004), known as a SWOT analysis. An important element in conducting a SWOT analysis is to include a broad representation of stakeholders in a strategic planning task force that includes program personnel, former clients, supervising personnel, employers of students, and representatives of national professional societies. The task force should be composed of as many as 10 so as to form two nominal participant groups of five. Each group participates independently in taking SWOTs.

Strengths or "What is a Career Service Program Doing Right?" The two nominal groups are given such questions as, what are or should be the purposes or functions as part of the

mission of the Career Service? Which of these are being performed particularly well? Can you give examples of successful performances? Which are being performed at a satisfactory level?

Weaknesses or "What are Shortcomings?" Of the purposes a career service provides, which might be targeted for improvement? Can you cite instances where better performance is called for? From your perspective, how might each instance be improved?

Opportunities or "What Might a Career Service Consider Doing?" Are there purposes, functions, or services that could be provided by the Career Service that are not being provided? If so, what are some reasons you believe each of these purposes could be considered for enhancing the mission?

Threats or "What are the Prospects for the Continued Development and Health of the Service, and What are the Limitations Regarding the Competition for Resources?" What are circumstances or events that might result in setbacks in the successful execution of the purposes of the mission? What are back-up resources to offset the effect of potential threats?

Using information gathered from the nominal groups or supplementary interviews with non-members of the strategic planning task force, a synthesis of salient points for each of the respective SWOT elements is derived and recorded for a Strategic Planning document. The engagement in these four dimensions of organizational assessment recorded in the strategic planning document represents the "state-of-being" (CSI, Leierer et al., 2022) of the career service.

Visioning

The visioning process entails opening the mind to identify possibilities for the future of the organization unencumbered by immediate practical limitations or reality constraints. The process begins by asking the nominal groups to address the question, what are the social/economic trends that will affect the organization and career service over the next 10 years? Given these trends, what do you see the organization and career service looking like in 10 years? What are the gaps between the existing career service and the service 10 years from now? These trends and gaps are recorded in the Strategic Planning document.

Analysis

From the organizational assessment and visioning processes in the Communications phase, the objective of the Analysis phase is to identify a wide array of potential strategic issues and problems facing the career service in the quest to move toward the vision of the future. What are the key questions or issues that arise in considering the gaps between the existing state of being and the vision? Why do the gaps exist? Addressing these questions facilitates an understanding of the causes of the gaps.

An example of a gap could be, how can we provide high quality and comprehensive online career counseling services to students and alumni that are comparable in outputs and outcomes to face-to-face career counseling? Reasons for this gap could relate to societal and institutional advancements in technology, client expectations of variety in the delivery of services, online capabilities within the organization requiring further development, and a growing body of research related to how online career counseling has unique capabilities to be taken advantage of. Gap statements should be recorded in the Strategic Planning document along with a brief rationale for each gap.

Synthesis

This phase concerns the framing of 1–3 of the most important strategic issues facing the career service in the next five years from the list of gaps formulated in the Analysis phase. In selecting the most important strategic issues, they must meet the following criteria.

- The challenge or opportunity is long range, at least two or more years to address.

- The impact extends beyond the career program to department and even organizational levels.

- There will be budgetary implications and risks.

- The resolution will involve new goals, resources, policies, facilities, and staff changes.

- It is unclear what the best approach would be to resolve the issue.

- The issue requires involvement, support, and cooperation from the next level of supervision and higher.

- The consequences of not addressing the issue are a definite threat to the maintenance and further development of the career service.

- The issue is emotionally charged.

Each of the first 1–3 strategic issues should also raise the following questions: What is it about the issue that relates it to the vision, mission, purposes, and SWOTs? Who says it is an issue? What are the consequences of ignoring it? Can we do something about it? Should it be broken into two or more issues? The focus of the strategic planning task force in the Synthesis phase is on the issue(s), not solutions. There should be agreement among key supervisors and decision makers that the issue(s) is worthy of further exploration of it. The final 1–3 issues should be placed in the Strategic Planning document with important questions and caveats.

Extending the example above, the strategic planning task force ranked the offering of online career counseling to students and alumni as #1 on the list of strategic issues to be addressed in the next five years. The offering of online career counseling was viewed as a necessary added capability of the career center through extending available services to current students at their residences, students away from campus on internships, to students enrolled in overseas satellite campuses, and alumni who wish to maintain active accounts with HQU. Here, online career counseling will include not only one-session interventions, but also brief staff-assisted, and intensive counseling extending over multiple sessions.

Valuing

In this phase, the existing mission and purpose statements are examined to determine whether they should be modified in any way in light of the high priority strategic issues outlined above. Does a new purpose emerge or does the issue extend an existing purpose? What are the implications for the ways in which the existing purposes are carried out? What are the implications for existing staff, students, supervisors, alumni? What assumptions are we making to address changes to the mission and purposes? If there is more than one strategic issue, how are they ranked in terms of priorities to address them, and what criteria are used for determining the ranks? The output of the Valuing phase is a ranking of 1–3 top strategic issues which are placed in the Strategic Planning document with a rationale for their ranking.

In the example carried forward, the offering of online career counseling to students and alumni remained as the first choice among strategic issues for the HQU Career Center and the issue was placed under the purpose statement, "Provide comprehensive career services." Further, as with employing CIP theory with individuals, the conclusion of this phase is considered a key organizational choice regarding the future of the career service. However, as with individuals, an organizational decision is not made until a choice is put into action with appropriate planning, committed stakeholders, and resources.

Execution

The strategic planning task force now turns from "doing the right things" to "doing things right," and therefore transitions from strategic planning to operations planning. However, in order to do the right things, a plan must be developed to implement the desired improvements to the mission of the HQU Career Center described in the previous Valuing phase. The development and implementation of a plan is conducted in two steps, (1) develop goals and objectives, and (2) formulate implementation strategies, performance indicators, and a budget.

Develop Goals and Objectives

A way to think about these terms is that goals are broad statements of accomplishments that can be attained in two to five years, whereas objectives can be accomplished in one year, and through annual yearly accomplishments, lead to the achievement of goal. For example, related to the offering of online career counseling to current students and alumni, a goal and subordinate objectives might be as follows:

Goal. In three years, the HQU Career Services will provide the following CIP theory-based assessments online with appropriate feedback mechanisms: the CSI, CTI, VMS/VFS, and a modified version of the DSW amenable to the online environment.

Objective, first year. The CTI and *CTI Workbook* will be made available to online users since both are already developed for online usage.

Objective, second year. Develop the CSI and VMS/VFS for online usage with scoring and interactive capabilities.

Objective, third year. Develop and implement a version of the DSW with interactive capabilities.

Formulate Implementation Strategies, Performance Indicators, and Required Resources

A strategy is the sequence of events required to achieve an objective. Developing a chart with a listing of milestones with dates of achievement is a useful planning technique for accomplishing an objective. Performance indicators are observable and measurable achievements that signal the attainment of an objective. A proposed budget contains the add-on costs to implement each objective to reach a goal. One must be mindful that any additions or modifications to a career center's mission and purposes typically carry new operating costs that must be absorbed by the institution (see Chapter 19). Sometimes, however, there are external public and private funding agencies that can support the development and implementation of new advancements in career services, particularly to support clients with unique needs and challenges.

However, once the funding period for development and implementation is over, the home institution must pick up any increases in operating expenses which must be anticipated by supervisors and decision makers. If a strategic planning task force member has had experience seeking, obtaining, and administering external grants, this person can be very helpful in developing a proposal for seeking internal or external support for implementing the desired change in the mission and purposes of the career service.

One option for planning implementation strategies is to use an implementation model as a starting point. Sampson and Lenz (2023) provide an implementation model for career interventions that includes the following eight steps:

1. Evaluate Current Career Interventions

2. Select, Adapt, Revise, and Develop Improved Career Interventions

3. Integrate Improved Career Interventions with Existing Career Interventions

4. Train Staff in Pilot Sites

5. Conduct Pilot Testing

6. Train All Staff Members

7. Deliver Career Interventions

8. Conduct Ongoing Evaluation and Continue Accountability Tasks

Organizational Context and the Implementation of a Strategic Plan

As described above, strategic planning is a problem solving and decision-making method according to CIP theory by which a strategic planning task force evaluates and develops the mission and purposes of a career service. In conducting the strategic planning process, a task force must be mindful that this process occurs within the mission, capabilities, constraints, and resources of a broader organization, whether it be a non-profit educational institution, government agency, or a for-profit corporation. Therefore, there are inevitable limits and boundary conditions that must be kept in mind as a task force engages the strategic planning process. The first of these boundary conditions is the realm of strategic issues to be explored.

Strategic Issues

The following are examples of strategic issues related to the boundaries of a career service within a postsecondary setting: Should career services be offered within an array of general counseling services under a single administrative unit, or a completely separate unit with its own director and budget? Should a career service offer both in-person services as well as online services including in-depth career counseling? Should a career service include freshman orientation or career advising? Should it include employment services and experiential learning opportunities? Are career services integrally involved with the general education program through the offering of a career development course for academic credit? How should career services align with the institution's broader goals to ensure student success (e.g., https://strategicplan.fsu.edu/student-success/) and engagement? Should the career service provide a full range of career services to alumni? Should the career service form a special relationship with the athletic department to facilitate career decision-making and employment of student-athletes?

Examples of strategic issues in for-profit settings might include: Should career services be offered in-house or contracted out to independent service providers? Through which organizational department should career services be provided? How are career services integrated with personnel recruitment, selection, training, promotion, termination, and out-placement? To what extent does the organization support older workers and retirees in their career transitions (Hirschi & Pang, 2020)? Should a career service incorporate employee assistance programs that treat alcoholism, substance abuse, or certain types of mental health issues such as depression, anxiety, burnout? Should a career service program be integrally involved with the organization's own planning and organizational development?

In both educational, agency, and corporate settings, strategic planning should provide a method for setting boundary conditions in the offering of services in relation to support services offered by other programs and departments within an organization. A CIP theory-based strategic planning process would be amenable to both settings**.**

The Client Population

Boundary conditions also define those individuals who are targeted to receive services. Clients are those persons who meet the eligibility criteria and choose to avail themselves of the career services offered by a program. We find it helpful to distinguish between primary and secondary clients. In CIP theory terms, **primary clients** are those who are eligible to receive career services that ultimately facilitate the development of career problem solving and decision-making skills; for example, currently enrolled students, faculty, employees as well as persons who are not regular members of the organization such as alumni and "friends of the organization." **Secondary clients** are those who are affected by the primary client's changed capacity for career problem solving such as family members, co-workers, and supervisors**.** An issue to be resolved in the Execution phase of the CASVE cycle in strategic planning is the determination of who is eligible for services at no charge, who is assessed a fee for services, and how much will users be charged.

Resources and Services Offered

Having established the mission and purposes of a career service, as well as the target client population served, the question now becomes, from a CIP theory-based perspective, what career interventions will clients be able to access to help them acquire self-knowledge, options knowledge, decision-making skills, and manage metacognitions to enhance their readiness for making informed and careful career decisions? Consideration of the critical ingredients in career interventions may be an important consideration here (Brown et al., 2003; Sampson et al., 2020; See also Chapter 7). A career services practitioner should have immediately available, resources for assessing readiness for career decision-making and career interventions (see Chapter 4) to enhance self-knowledge (e.g., interest inventories, skills assessments) and options knowledge (e.g., occupational information), guidelines for progressing through the CASVE cycle (e.g., handouts depicting the cycle, and an Individual Learning Plan), to inform employment seeking (e.g., resume and interviewing guides), and mechanisms to facilitate self-awareness as a career problem solver (e.g., the *Guide to Good Decision-Making Exercise*). An additional consideration in the Execution phase is which resources and interventions will be made available in virtual formats. Personnel costs and fixed and variable expenses must also be analyzed with appropriation strategies formulated.

Effectiveness of Implementing the Strategic Plan

Strategic planning is linked to the evaluation and accountability of a career service program through CIP theory's paradigm. As stated many times in this book, a key aim of CIP theory is to not only provide a framework for career problem solving and decision-making in the present, but to create learning experiences that enable clients to acquire transferable career problem solving and decision-making skills that can be applied to future career decisions. A complete programmatic evaluation and accountability system, based on CIP theory, was presented in the preceding chapter, Chapter 19. Nevertheless, the Execution phase of the strategic planning process calls for the identification of performance indicators that can serve as benchmarks of success in implementing a plan for organizational development. For example, the National Association of Colleges and Employers (NACE) provides a <u>workbook</u> (NACE, 2019) that can be used by career services offices to evaluate their programs against NACE standards. The following are examples of key questions to be addressed in evaluating the effectiveness of the implementation of a plan.

1. To what extent were the intended goals and objectives of the plan achieved?
2. Were clients successful in addressing their presenting issue to their satisfaction?
3. To what extent did clients acquire mastery of the CASVE cycle skills?
4. To what extent were there sufficient resources to achieve the plan's goals and objectives?
5. Are there sufficient resources to institutionalize the new programmatic offerings beyond the design, development, and implementation phases?
6. Are there unintended effects of implementing the plan? If so, which are positive or negative?

To address each question above, a methodology, questionnaires and surveys, data gathering procedures, and the designation of a responsible individual for conducting the evaluation must be created before implementation of the plan (See Chapter 19 of this book). Additional information on the evaluation of career interventions and career guidance programs is provided by Sampson and Lenz (2023) and Whiston, et al. (2019).

Roles of Career Practitioners in a CIP Theory Environment

A CIP theory-based learning environment, with the ultimate aim of facilitating the development of career problem solving and decision-making skills, requires a variety of professional roles, each with their own knowledge base and skills. Such an environment extends beyond the more traditional one-on-one counseling relationship between a career counselor and a client intimately and privately exploring a presenting career problem (Carkhuff & Berenson, 1967; Rogers, 1962). As discussed above, helping a client solve a career problem and making a satisfactory and appropriate career decision often takes place within a career center that is based in an organizational or community context. Thus, we envision a set of professional roles conceptualized in the form of hierarchy of concentric overlapping roles. Figure 20.1 presents five roles with the practitioner role in the center, within a teacher-educator role, within a developer-designer-evaluator role, and within an ultimate strategic planner role.

Figure 20.1

Professional Roles in Facilitation Career Problem Solving and Decision-Making Skills
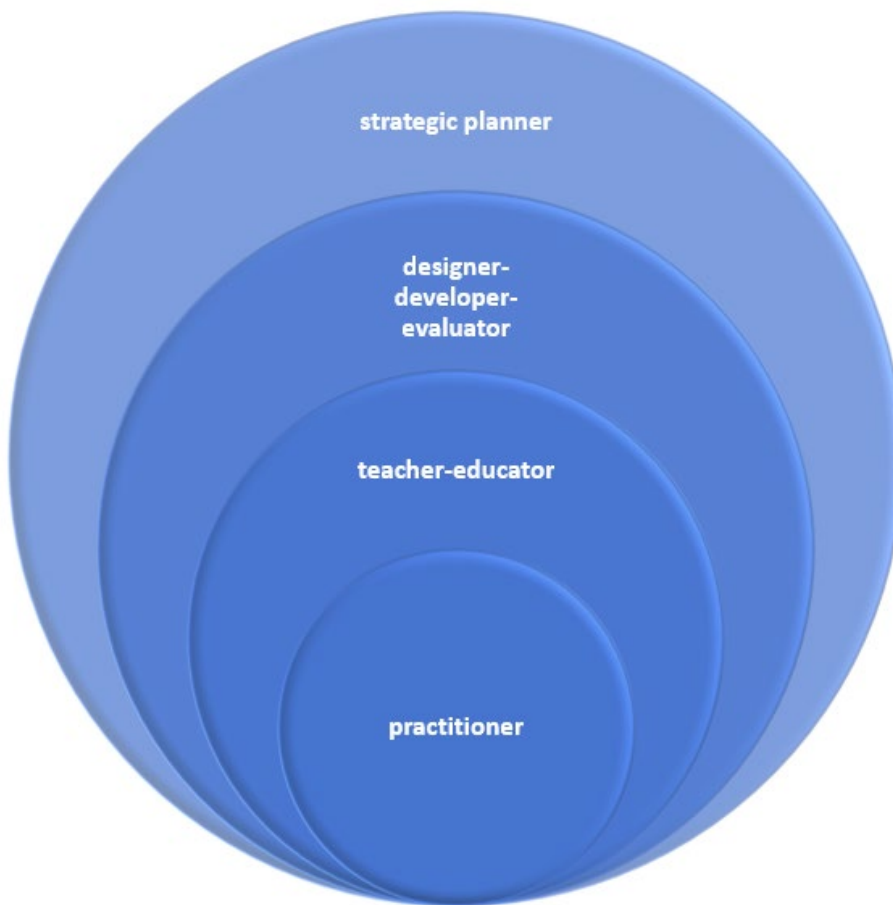
CIP Practitioner

The CIP practitioner is first knowledgeable regarding the CIP theoretical paradigm and how to (a) foster the development each of the four domains the Pyramid of Information Processing, (b) manage progression through the CASVE cycle, and (c) provide the facilitative conditions that enable the exploration of all of the dimensions of a presenting career problem (Rogers, 1957). The CIP practitioner is also well versed in career assessments that identify the level of readiness for career interventions such as the Career State Inventory (CSI; Leierer et al., 2022), the Career Thoughts Inventory (CTI; Sampson et al., 1996), and the Decision Space Worksheet (DSW; Peterson et al., 2010; Peterson et al., 2016). In addition, a CIP practitioner should be familiar with developing, with a client, an individualized learning plan (ILP; Sampson et al., 2020) that enables the client to set forth learning objectives in a sequence that leads to making a career decision and formulating a plan of action to carry it out. Further, a practitioner should be knowledgeable in the use of self-exploration inventories such as the Self-Directed Search (SDS; Holland & Messer, 2017), and a variety of ways to access occupational, educational, and employment information. Finally, a CIP theory-informed practitioner, who also has formal training as a counselor should be knowledgeable regarding the possible impact of

mental health issues (See Chapter 10 of this book) such as depression, anxiety, relationship problems, and more severe chronic mental health disturbances and how these influence the capacity for career decision-making (Lenz et al., 2010; Marks et al., 2021; Walker & Peterson, 2012).

Teacher-Educator

In CIP theory, the development of career problem solving and decision-making skills can take place in a variety of learning environments in addition to one-on-one career counseling. Individual career interventions may include self-directed learning, brief staff-assisted, and intensive career counseling (Sampson et al., 2020). Moreover, interventions may occur in large open spaces with work tables, in private counseling offices, conference rooms, in formal classrooms, and in virtual formats. Sometimes, career decision-making occurs within group settings in which clients work collectively in progressing through the CASVE cycle. With group instruction, the works of Robert Gagne (1985) provide guidance in establishing the conditions of learning with objectives and prescribed or planned learning experiences. Chapter 7 of this text presents a thorough explanation of how to prepare and deliver instruction regarding the development of career problem solving and decision-making skills in formal classroom settings. The Florida State University Career Center offers up to 5 sections of a course, Introduction to Career Development, for academic credit each semester. Career practitioners serve as lead instructors for each section with typically 20-25 students.

Designer-Developer-Evaluator

In addition to providing conditions for individual growth and learning, CIP theory-informed practitioners must also think in terms of offering services and programs to a diverse population of potential clients. A product of the strategic planning exercise is often the formulation of goals and objectives of a new programmatic offering, such as establishing an online career counseling service for students and alumni over the next three years or increasing outreach to students who present with neurodiverse characteristics (Hamilton & Petty, 2023). At this level, career practitioners must be prepared to design, develop, and deliver effective and efficient interventions using a variety of means to help individuals enhance their career decision-making skills. Career practitioners must be able to design and develop an instructional system in which to foster certain learning objectives. In addition, practitioners must also formulate an evaluation strategy (See Chapter 19) to determine whether clients have mastered the intended learning objectives following a prescribed intervention. The design and development functions require knowledge of educational and cognitive psychology, and instructional media, while the evaluation function requires knowledge of research design and measurement.

Strategic Planner

The CIP theory-informed practitioner, as a strategic planner, focuses on the contribution of career services to the good of the organization and the community. The capabilities of strategic thinking and strategic planning are particularly relevant to functioning effectively in leadership positions within a career center. Strategic planning draws on the visions and ideals of both the organization as well as the profession of career development and counseling. As a strategic planner, a career practitioner becomes proactive in promoting the career service by constantly entertaining the possibility for extending the kinds and quality of services made available to the organization, as compared to being reactive as has been typically the case in the

practitioner role in serving drop-in individuals seeking immediate assistance with a pressing career problem. The strategic planning role, as a source of vocational meaning (Peterson, et al., 2017), also requires that career practitioners possess a strong belief in the worth of their profession for enhancing the quality of life and work in society. The strategic planner says, "I have something of value to offer individuals that deserves an important place in the functioning of the organization." Professional staff members, and especially the career services director, although sometimes focusing inward to assure the effectiveness of service delivery, should also concentrate on how well the career service, through its array of services and programs, is serving the organization and the community, and should be inexorably attuned to exploring the possibilities for extending the range of career service offerings that are an integral part of the core functions of the organization.

Role of Public Policy in Strategic Planning

According to the OECD (2004), career guidance contributes to three main policy goals: (1) promotion of lifelong learning and effective functioning of the national education system, (2) effective functioning of the labour market and through this the economy, and (3) as a long-term outcome, social equity. These three categories are widely used as a framework for describing the policy rationale for career guidance systems and policy development. However, the balance between and within the three categories varies across countries (OECD, 2004; Watts, 2014; Watts & Fretwell, 2004).

In many countries, career assistance is acknowledged as a shared policy responsibility across education, training, youth, employment, and social affairs policy. Key instruments in informing and governing career assistance policy development include regulations, economic incentives, and information. Regulation includes directives, guidelines, norms, rules and procedures which support career assistance for citizens. Economic incentives refer to resources provided by national or international donors to enable the application of the regulations. Information refers to media used by governments to communicate policy messages for stakeholders, providers, and citizens (McCarthy & Borbely-Pécze, 2021). In accordance with shared policy responsibility, career services tend to be located in schools, vocational education and training, higher education, adult education, employment and youth services. However, individual careers involve construction of pathways across these sectors as a continuum, on a lifelong basis.

The importance and utility of career assistance is acknowledged worldwide (Athanasou & Perera, 2019). However, a typical challenge in establishing coordinated career assistance is an overall lack of shared understanding among policy makers and stakeholders of the primary purpose of these services, operation of the services, and their desirable outcomes. Countries vary in their degree of centralization and government sectors can have different structures and specific mandates based on regulations defining their funding, methods, and responsibilities (ILO/ETF, 2021; Barnes et al., 2020; Cedefop, 2011). Challenges can be connected to a lack of accurate labor market information, fragmented service delivery and differences in the operating cultures between different sectors responsible for the service delivery (e.g., education, employment, youth, social and health). Inconsistency between sectors often leads to competition rather than a coordinated, quality service. Absence of jointly agreed quality standards for career assistance may lead to general low quality of provision, low labour market and learning relevance, as well as unethical treatment and/or discrimination (ILO/ETF, 2021).

The potential of technology is also constrained by fragmented coverage, equipment cost and the limited information and computer technology (ICT) skills of citizens and career practitioners, as well as inadequate integration of ICT the career service sector (Kettunen & Sampson, 2019). Implementation of a more consistent strategic approach (Kettunen et al., 2016) requires both a jointly agreed cross-ministerial strategy for career development and a common conceptual framework for service delivery and funding, as well as a formal commitment to the sustainable development of ICT in career services. Even with coherent guidelines and strategies, implementation of ICT in career services is seen as a complex and protracted process.

A growing number of countries are linking career assistance with lifelong learning or skills strategies in accordance with the ongoing changes in society. The aim is to secure continuity between different sectors in policy development and service delivery. This implies a shift from intervention at key points in an individual's life to a lifelong perspective; and from the provision of external expert support to the individual developing and utilizing career adaptability (Brown & Bimrose, 2018; Fejes & Dahlstedt, 2019) and career management skills (CMS) (Cedefop, 2008; Di Fabio, 2019; ELGPN, 2010; Lent, 2020; Sultana, 2008). Whiston and Blustein (2013) noted the impact of career interventions, not just on the local level but as a means of preparing individuals for work in the 21st century.

The enhancement of career assistance is aligned also with the [United Nations Sustainable Development Goals (SGDs)](). Individuals' capacities and knowledge to make informed plans and decisions on learning and job are pivotal in ensuring inclusive and equitable quality education and in promoting lifelong learning opportunities for all (SDG 4). Reskilling and improving skills utilization in enterprises contributes to inclusive and sustainable economic growth, full and productive employment, and decent work for all (SDG 8). For the individual, improving resilience through skills means reducing dependence on market conditions and increasing one's potential to navigate through life and professional transitions (European Commission, 2020).

Differentiated Service Delivery and Public Policy

The models and interventions in career development are often influenced by the career theory or theories the service providers use. Theories influence the services through the design and use of assessments, career development processes and the availability of information and instructional resources (Sampson, 2008; Sampson & Lenz, 2023). In addition to theories, a common denominator for the design of career services is the time available for career interventions. Often the funding that is available for career services is limited and there are expectations from policy makers that the existing funding should be used as cost-effectively as possible (OECD, 2004).

In meeting the increased demand for career assistance, a number of countries have realized that using differentiated career guidance interventions to improve access is a key issue. The classification of user groups can be elaborated in accordance with national contexts, and differentiated services seem relevant in meeting the needs of different user groups/audiences. In providing services, information advisers, learning advisers and career advisers have different levels of qualifications to serve the needs of the different users (ELGPN, 2010). For example, in Estonia the differentiated service delivery model according to CIP theory was applied in 2010 as an underlying theoretical principle in the design of publicly funded regional "Rajaleidja" career centers (Sampson, 2010).

The effective design and implementation of career services is a collaborative effort among service providers from different sectors, so it is important to have a common understanding among collaborating partners and stakeholders of the purpose and strategies for evaluation and accountability of the services (Sampson & Lenz, 2023). Considering the cost-effectiveness of career services is essential as more individuals seek assistance with their career development. CIP theory provides a framework for how to have a balance on the supply and demand for services as a social justice issue (Sampson et al., 2017). The CIP theory-based approach illustrates how the choice of a particular career theory to guide career interventions (Sampson & Lenz, 2023) influences the amount of time required to deliver and supervise career interventions and the resulting impact on the supply of career interventions in relation to the demand (Sampson, 2008; Sampson et al., 2020).

Since the beginning of the 2000s, the models for career development have shifted from singular matching exercises into activities which are connected to lifelong development (Hartung, 2020; Kettunen, 2017; Patton & McMahon, 2014). International reviews with a number of case studies strongly indicate that the demand for career assistance far exceeds the supply of services and that citizens' needs cannot be met by relying exclusively on the traditional forms of career assistance (e.g., Barnes et al., 2020; ELGPN, 2010; Zelloth, 2009). In meeting the increased demand for career assistance, a number of countries have realized that using differentiated career interventions to improve access is a key issue (see Chapter 15 for further discussion of this topic). No service provider, professional group or organization alone can respond to the increasing needs of more diverse client groups.

Chapter 20 Summary

This chapter reviewed the concepts of strategic thinking, operations planning, and strategic planning as ways of thinking about the formulation of the intents of career services. A six-stage process was described that can be used as a guideline for the strategic planning process, in which a planning committee begins with the question, Are we doing the right things? and progresses to the question, Are we doing things right? The activity of strategic planning was linked to cognitive information processing theory and to accountability through the delineation of the client population to be served and the types of decisions the service is designed to help the clients to make. Primary clients, those who acquire new knowledge and skills, were contrasted with secondary clients, those who are the benefactors of changes in the primary clients. The effectiveness of a career services program is ultimately determined by the degree to which clients acquire new capabilities and the relevance of these capabilities to the core functions of the organization in which the career service is located. The chapter closed with an examination of differentiated service delivery and public policy.

Getting the Most Benefit from Reading Chapter 20

To effectively learn the material in this chapter, complete one or more of the following activities:

- Form a strategic planning group of five or six persons. Locate a local career services program in the community and design a strategic planning process that the service could employ.

- Locate a local career services program in your community, and conduct an investigation of how its mission, goals, and objectives were derived. To what degree were strategic planning principles used?

- Locate a local career services program in your community and describe the characteristics of its clientele. Discuss with the staff how the trends toward a global economy, technological innovation, new ways of working, and new work/family roles in the labor force will likely influence (a) the nature of the career services offered and (b) the client's consideration of career alternatives.

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