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Thoughts on Theories: Case Conceptualization From Five Perspectives

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Abstract

A special issue of the *Journal of Employment Counseling* in December 2011 presented 13 brief articles from 17 current career counseling thought leaders (Arthur & Collins, Leong, Pope, Krumboltz, Schlossberg, Bright & Pryor, Hansen, McMahon, Niles, Magnusson & Redekopp, Savickas, Amundson, and Neault & Pickerell). Eight of those authors came together at the NCDA 2013 conference in Boston to participate in a "Thoughts on Theories" panel based on their contributions to that special issue. All agreed that, if time permitted, it would have been interesting to apply their theories and approaches to a common case. Seven of the original authors and NCDA panelists have contributed to a brief case conceptualization that vividly illustrates the similarities and differences in their approaches to working with clients. Approaches included in this article include the Chaos Theory of Careers, Culture-Infused Career Counselling, Career Engagement, Happenstance Learning Theory, and Active Engagement through Metaphors.

It is commonly accepted that career and employment counselors use theories and models to conceptualize their clients' concerns and to select appropriate interventions. However, as the workplace and client demographics continue to change, it is important to have access to theories and models that fit the unique needs of today's counselors. The adage, attributed to Einstein, "if you keep doing what you're doing, you'll keep getting the results you've been getting" holds true for today's counselors. Traditional career theories were effective when career paths were relatively stable within a predictable and homogenous workplace. As that doesn't come close to describing work within the global economy, counselors find themselves reaching for new explanatory theories and models.

A special issue of the *Journal of Employment Counseling* (Neault, 2011) published 13 brief articles written by 17 career theorists and thought leaders, in which they each shared their current "thoughts on theories." Many of the articles focussed on working with diverse clients; Arthur and Collins (2011) described culture-infused career counseling (CICC), Leong (2011) wrote about the cultural accommodation model of counseling (CAM) with a focus on applications for employment counselors, and Pope (2011) introduced his model for career counseling with underserved populations (CCUSP). Other articles focused on change and chance; Krumboltz (2011) wrote about happenstance learning theory and Schlossberg (2011) described her transition model and how its 4S system applies to work life transitions. Another group of articles focused on contextual and systemic influences; Bright and Pryor (2011) shared highlights of the chaos theory of careers (CTC), Hansen (2011) discussed the origins of her holistic integrative life planning approach (ILP), McMahon (2011) wrote about the systems theory framework of career development (STF), and Niles (2011) presented highlights of career flow, a hope-centered model of career development (HCMCD). Two other articles described constructivist approaches; Magnusson and Redekopp (2011) introduced their model for coherent career practice, based on the four pillars of "*career literacy, career gumption, career context*, and *career integrity*" (p. 176) and Savickas (2011) described how to "listen for a story" (p. 179) using career construction theory. The final two articles explored the notion of engagement from two different perspectives; Neault and Pickerell (2011) introduced their model of career engagement and Amundson (2011) shared

highlights on active engagement and his innovative use of metaphors. Combined, these articles provide brief summaries of complex theories and models, in the authors' own words, making emerging theories accessible to career and employment counselors looking for new ways to conceptualize their clients' career concerns.

To follow up this special issue, eight of the *Thoughts on Theories* authors presented on a panel at the 2013 National Career Development Association conference in Boston. Of them, seven contributed to this current article by sharing their preliminary thoughts on how to approach a single case. In the sections that follow, the case is presented with responses from the perspective of the chaos theory of careers, active engagement through metaphors, happenstance learning theory, career engagement, and culture-infused career counseling. The similarities and differences in these approaches are then discussed, concluding with recommendations for a continuation of "thoughts on theories" discussions.

The Case

Tony is a 46 year old Asian American who has come to see you to discuss concerns regarding his career. Due to recent events, both at home and at work, Tony is rethinking his career goals.

Tony is a mid-level manager for a large telecommunications firm, focused mostly on mobile technology. He manages a marketing and promotions team of 15, reporting to the Director of Marketing who, in turn, reports to the VP of Marketing. He is one of three managers within this department. The organization has been restructuring over the past 18 months, both in terms of product messaging, logo, and approaches to advertising as well as a reorganization of team members. There have been some layoffs and everyone is doing more with less. The organization has also introduced several new technology systems, offering a more complete integration across the organization. Although Tony recognizes the long term benefit to this new system, he is finding it challenging to learn yet another way of doing business and the roll-out has not gone as smoothly as hoped. This has added even more pressure to an already stressful environment. Tony used to thrive in this pressure-filled environment but is now feeling like it is too much.

Tony is in a long-term relationship with his partner, Jacques. Although Tony makes a good salary, they have always considered Jacques as the primary wage earner in their family. Jacques is completely supportive of whatever Tony chooses to do with his career, including leaving his current position or even returning to school. Last month, Tony lost his 50 year old brother to a sudden heart attack; his brother had very recently joked "this job is going to kill me" when confiding in Tony about his stressful work environment. Tony also just learned that his best friend has been diagnosed with cancer. All of this is proving to be a bit of a wake-up call for Tony. He has always loved his job and hoped to move into a Director position, either at this firm or another, but life's recent events have him wondering about a new path. In addition, the passion Tony has had for his job is waning; the ongoing restructuring and added expectations are making Tony feel like the proverbial rat in the maze.

Case Conceptualizations

Chaos Theory of Careers

From a Chaos Theory of Careers perspective (CTC; Bright & Pryor, 2008; Pryor & Bright, 2011) Tony's stress and disillusionment may reflect his thinking in closed systems terms about his work and life. A closed system is one in which all of the key influences are known and therefore outcomes are predictable and to some degree controllable. However, Tony is being forced to confront some of the uncertainties of reality which is inescapably an open system in terms of restructuring, his brother's death, and his friend's cancer. At work, Tony faces frustrations also due to his closed-system thinking. The new technology roll out has not gone as planned. From an open-systems CTC perspective this should not be a surprise. Tony appears to have some expectations that change will come to an end at work. This is an unrealistic expectation, especially in a role that is heavily dependent upon information technology.

In CTC terms, Tony's thinking appears to have become trapped within a Torus (Routine) attractor. This is characterised by attempts to eliminate uncertainty and chance events while maximising predictability and control. Some of Tony's stress and reflection may reflect how he is currently failing to incorporate the open system's realities of the unexpected events in his life.

Ironically, more change to escape the Torus attractor of routine change in his work may be what he requires. The constraints, perceived or otherwise, he feels exist in his relationship and his values around job security and risk may need exploring. The Change Perception Index and Luck Readiness Index will be useful in understanding more deeply Tony's reaction to change. The Creative Strategies card sort may be useful in helping him move beyond closed system probability thinking to open system possibility thinking. Tony needs to begin to consider what really matters to him, what he values most, and what sort of future including work will be the most meaningful and productive. These are the issues to be explored in counseling.

Tony may want to consider how the use of goals (the point attractor) may be contributing to expectations of stability that may not be met by reality, perhaps setting him up for more frustration.

Active Engagement Through Metaphors

A number of metaphors are articulated in this case description (Amundson, 2010; Amundson, in press). I would probably follow-up with the "rat in a maze" metaphor since it incorporates elements of pathway, pressure, a lowering of passion, and perhaps even a new realization – a wake-up call. In terms of working with the metaphor, I would start by asking Tony to fully explain what this image means to him. I would also ask him to sketch out what the image might look like (a drawing). In this first phase, I am basically looking for a picture of the current situation from his perspective. Some elements might include: Is he alone in the maze or are there others there as well? How fast is he moving in the maze? What are some of his feelings and thoughts about being in the maze? After some dialogue, I would shift the time dimension and explore how he got to this place. What happened to put him in this predicament? Lastly, I would shift the focus again and look to the future. I would ask him to identify what he would like to have happen and to also think about some strategies for getting there. Through this process there would be an

opportunity to add to the existing picture or even to add new images. My basic strategy would be to use the metaphor as a foundation for exploration through all of the time dimensions.

I also think that it might be helpful to broaden the exploration and get some further insights from Jacques. There is the suggestion that Jacques is very supportive and if this is indeed the case, then perhaps he could be invited to share some of his perspectives either in person or through the Significant Others Questionnaire.

By exploring the metaphor and inviting Jacques for input, I am creating a climate of active engagement and setting the stage for "sticky" learning. This process may lead to a more creative exploration and problem solving.

Happenstance Learning Theory

The Happenstance Learning Theory (Krumboltz, 2009; Krumboltz & Levin, 2010) is action-oriented. We learn best from our own actions, not from advice or insights given by others. Thus, after Tony has explained his concerns to me, I would make sure he knows that I understand but then engage him in the process of getting him to take some action. Maybe something like this:

> Tony, you have shared with me the multiple pressures in your life right now. I understand that all these pressures are making you wonder whether you should remain in your current position or move elsewhere. To make any progress you are going to have to DO something. What exactly? I don't know, but it would be useful for you and me to brainstorm together about possible first action steps you could take. You, of course, are the only one who can decide which action would be best for you. But how about we start listing some possibilities now?

After we brainstorm a list of possible actions, I would ask Tony, "Which one of these actions would you be willing to take next?" When he identifies one action, I would ask, "By what date and time would you perform that action?" My next question would be, "Would you be willing to send me an e-mail telling me what happened when you took that action?" Clients want to please their counselors, and so I might say, "OK, Tony, wonderful! I will be at my computer next Thursday at 12 noon and will be looking for your e-mail." Future counseling sessions would focus on subsequent action steps that the client could take and what Tony is learning from them.

Career Engagement

Career engagement is defined as "the current emotional and cognitive connection to one's career; it is a state in which one is focused, energized, and able to derive pleasure from activities linked to work and other life roles" (Pickerell, 2013, p. 4). Individuals are in the zone of engagement when challenge and capacity are in balance (Neault, 2012); too little challenge for the available capacity will move individuals out of the zone of engagement towards feeling underutilized. Conversely, too much challenge will move individuals out of the zone of engagement towards feeling overwhelmed. This is the situation Tony is experiencing; the organizational restructuring and introduction of new systems have increased the challenges he experiences at work to beyond what is reasonable for Tony, at this time. Concurrently, staff layoffs have reduced organizational capacity and Tony's current personal concerns have reduced his personal capacity. This

increase in challenge, and reduction in capacity, has moved Tony out of the zone of engagement towards feeling overwhelmed. This is supported within the case notes with comments including "even more pressure," "it is too much," and "feeling like the proverbial rat in the maze."

To return Tony to the zone of engagement, there needs to be a reduction in the level of challenge he is experiencing or an increase in the available capacity. Unfortunately, it may be difficult to increase organizational capacity at this time; restructuring has resulted in everyone doing more with less. It may also be difficult to increase Tony's personal capacity; although Jacques is incredibly supportive, Tony must still mourn the loss of his brother and wants to offer support to his friend during cancer treatments. As such, it may be most effective to work with Tony to reduce his work-related challenges, either within his current workplace or, as he reported that passion for his job is waning, by repositioning his career to a new setting. Reflecting on Tony's current situation through the lens of career engagement, I'd help Tony explore career alternatives that might restore a satisfying mix of challenge and capacity – for example, would self-employment or cutting back to part-time work be a realistic option for now?

Culture-Infused Career Counselling

Consistent with the premises of Culture-Infused Career Counselling (CICC; Arthur & Collins, 2010; Collins & Arthur, 2010), it is important for career counselors to reflect on their personal cultural identities, the cultural identities of clients, and the influences of personal and professional cultures on the working alliance. Culture-Infused Career Counselling is grounded by the value of social justice, through considering systemic and social influences on clients' career concerns, and through designing relevant interventions. In reading about the case example, I began to reflect about how my identity as a White heterosexual female may or may not be relevant for career counseling with Tony. There are specific descriptors of Tony that may or may not be relevant for exploring his experience related to his career goals. For example, I am curious to know how his identity as a male may be tied into his notions of career progression as a source of social power and achievement. He is in a long-term same-sex relationship, and I am also curious to know how his role within the relationship may be related to his role of provider and whether or not he would like to invite his partner to join in the career counseling process with him. After pondering these potential intersections of cultural identity, I would want to invite Tony to tell me what aspects of his identity, his relationships, and other aspects of his current life contexts that he believes are relevant and to begin with the influences that he feels matter most in exploring his preferred career goals. I would want to look for points of commonality in building a working alliance from which we may discuss the experience of mid-life, the increasing pace of the world of work, and possible ways that he might feel more passionate and rewarded in his work role, within the current company or in exploring new career pathways. I would also want to listen to Tony's story in light of social justice and systemic influences in the workplace, where many experienced and competent employees are consumed by expectations for working harder at the expense of their personal health, interpersonal relationships, and their sense of connection to work.

Discussion

Although the brevity of these case conceptualizations restricted the authors from describing their counseling approaches in depth, they offer sufficient detail to surface both similarities and differences. Similarities across some or all of the approaches include creative exploration and problem-solving, taking a speculative stance, taking action, acknowledging the importance of building a working alliance, and welcoming the clients' partner to participate in the process. Each of the approaches, however, also offered a unique perspective. Some of these similarities and differences are examined in this section.

Similarities

Each case conceptualization recommends a process of exploration, including a "Creative Strategies card sort" in the chaos theory of careers contribution, "creative exploration and problem-solving" in the active engagement approach, "brainstorming possible actions" from the happenstance learning theory perspective, "exploring career alternatives" in the career engagement section, and "discuss[ing] . . . possible ways that he might feel more passionate and rewarded" in the culture-infused career counseling response.

All five of the approaches also used tentative language and a speculative tone. Examples include "appears to have become" and "may reflect" from the chaos theory of careers, "probably" and "it might be helpful" from the active engagement approach, "maybe" and "I don't know" from happenstance learning theory, "may be most effective" from career engagement, and "I am curious to know" from the culture-infused career counseling approach.

Three of the case conceptualizations presented a particularly action-oriented approach, although action was implied in the other two as well. Examples include the happenstance learning theory explicit statements, "To make any progress you are going to have to DO something" and "Which one of these actions would you be willing to take next?" Similarly, the active engagement approach is "creating a climate of active engagement and setting the stage for 'sticky' learning." Within the career engagement response, a suggestion is made to help Tony "reduce his work-related challenges" – a strategy that will require direct action as well.

Although the culture-infused career counseling response was the only one to explicitly mention building a "working alliance" and finding "points of commonality," this theme was also alluded to in the description of the happenstance learning theory approach (e.g., "I would make sure he knows I understand" and "clients want to please their counselors"). Similarly, in the active engagement section, a focus is on understanding "the current situation from his perspective."

Two of the responses specifically explored the possibility of inviting the client's partner to contribute. Within the culture-infused career counseling response, "whether or not he would like to invite his partner to join in the career counseling process with him" was a question identified as important to explore. Similarly, from the active engagement perspective, if Tony's partner is supportive as described, "then perhaps he could be invited to share some of his perspectives either in person or through the Significant Others Questionnaire."

Differences

Each perspective, however, also brought something unique to the case conceptualization. For example, there are different perspectives on the value of goal-setting. In the chaos theory of careers response, the belief that goals may be "setting him up for more frustration" is presented. However, the active engagement approach invites the client to consider goals and strategies and the career engagement perspective describes the implicit goal of helping Tony "restore a satisfying mix of challenge and capacity." The chaos theory of careers response was also among only two that mentioned using any kind of assessment tools; within the active engagement response, the possibility of using a significant other's questionnaire was raised.

Not surprising, perhaps, was that the active engagement through metaphors response most actively explored the metaphor of the "rat in the maze"; although it was mentioned within the career engagement response, it was more as a descriptive than in the context of intervention. The active engagement perspective was also the only one to focus on the three dimensions of time: past, present, and future. Unique to happenstance learning theory was pinning the client down to a specific follow-up response (i.e., sending the counselor an e-mail by a specific date and time).

The career engagement, chaos theory of careers, and culture-infused career counseling perspectives each brought up workplace realities; unique to career engagement, however, was exploring (and, in this case, eliminating) the possibility of an intervention at an organizational level. From the chaos theory perspective, the discussion of the recent workplace challenges was more within a generic exploration of global workplace changes resulting in the need to shift from closed to open systems thinking. From the culture-infused perspective, the changing workplace expectations were examined through a social justice lens. This consideration of "social justice and systemic influences" was unique to the culture-infused career counseling perspective, although many of the other contributions also took a systems approach to conceptualizing Tony's career challenges. Also unique to the culture-infused perspective, not surprisingly, was reflecting on the counselor's own cultural identity along with the cultural identity of the client.

Summary and Next Steps

There are countless more themes that could be highlighted from these very brief examples of how to use theories and models to assist with case conceptualization and subsequent interventions. Clearly, one's theoretical foundations are influential in shaping everyday interactions with clients and, at a more fundamental level, what counselors identify as their clients' underlying problems and why.

Yet, in recent Canadian research on the skills and competencies of career development practitioners, knowledge about career theories and the competency to apply theoretical knowledge was rated surprisingly low (Life Strategies, 2013); it was also considered by many respondents to be unimportant. Many counselors and career practitioners complete a theories course as part of their training and then appear to shelve that knowledge along with their textbooks, rather than creatively using it to explore their clients' complex situations from a variety of diverse perspectives.

There appears to be a need for creative ways to introduce emerging theories and models, demonstrate their relevance, and provide tools and strategies to facilitate theoretical approaches to case conceptualization and intervention. Perhaps other career and employment counseling journals could devote a special issue to "Thoughts on Theories," providing opportunities for authors of theories and models to share their ideas in brief articles and case conceptualizations. Such special issues would provide an accessible overview of diverse perspectives, citing references that readers could turn to for more in-depth explanations of the approaches that resonate with them the most. Aside from serving as teaching tools in formal training, these special issues could be used as the foundation for webinars or lunch and learn sessions within the workplace, reaching practitioners and counselors who may not otherwise be exposed to emerging theories and models that fit well with their diverse clients in a rapidly changing workplace.

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