

**CASE STUDY: STRATEGIC PLANNING PROCESS USED BY THE TEXAS  
A&M UNIVERSITY CAREER CENTER WHEN CREATING  
TECHNOLOGY INITIATIVE PROJECT**

A Dissertation

by

MARY GAIL VERMILLION

Submitted to the Office of Graduate Studies of  
Texas A&M University  
in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY

December 2004

Major Subject: Educational Human Resource Development

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December 2004

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**ABSTRACT**

Case Study: Strategic Planning Process Used by the Texas A&M University Career Center When Creating Technology Initiative Project. (December 2004)

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There is a plethora of research and literature focusing on strategic planning yet there few case studies have been done that describe the strategic planning process for university career centers. No effective strategic planning guide has been written to assist career center employees with building a strategic plan that will assist in reaching all Texas A&M University students with job skills training. The purpose of this study is to give a detailed account of the strategic planning process used by the Texas A&M Career Center to create the technology initiative. The study will also provide guidance to the researcher and others who will be developing similar initiatives in the future. In an effort to assist career centers nationwide it would be helpful for those career centers to look at others, like Texas A&M Career Center, who have already begun the strategic planning process.

A descriptive case study design was chosen because it adds strength to what is already known and also helps explain complex issues. Case study research gives an in-depth contextual analysis of a limited number of events. The study of the planning process is very complex and case study research is one method that can be used to bring

deeper understanding and add strength to what we already know about the planning process (Dooley, 2002). Following the lead of Rice (2002) a descriptive case study was chosen so that the researcher could describe the strategic planning process and interpret the findings in a way that would provide greater insight. Qualitative methods, including examination of documents, examination of journals, calendars and meeting notes, and interviews with a few members involved in the process to clarify any questions of memory, were used in this study. The study described the technology initiative and split the development into five stages: Conception, Birth, Toddling, Up and Running, and Adolescence (Rice, 2002).

The researcher has completed the descriptive case study and analyzed the data according to the planning approach continuum. A new model has been created that provide insight to the researcher and hopefully other planners. Recommendations and conclusions have been provided that will hopefully be beneficial to other planners. The descriptive case study provides a story that highlights good and bad planning techniques and the researcher hopes that others will read and learn from this study. The purpose of the study has been fulfilled.

## **DEDICATION**

**Dodie Vermillion 1927 - 1992**

**Mike Vermillion 1956 - 1999**

This dissertation is dedicated to my mother Dodie Vermillion, who was the best mother in the world, and my brother Mike Vermillion, who was my idol for many years. Neither of you are here to see this but I know you would love this and laugh out loud because I am now Dr. Vermillion. I love and miss you more than you can ever know!

## ACKNOWLEDGEMENTS

I would like to take this space to thank the many people who made this dissertation possible. It would have been impossible to fulfill this dream without my sister Ann Vermillion who supported me financially and emotionally throughout my graduate work. She was the person who encouraged me to keep going and constantly asked, “What did you do on your dissertation today?” Ann has been my role model for hard work and perseverance. My sister, Susan Hastings, has also supported me emotionally and financially by allowing me to live with her during the last phase of my dissertation preparation. Susie is the one who would make me laugh and tell me not to worry when I got stressed. I love both of you so much and could not have completed my dissertation without your love, acceptance, and constant pushing. I need to thank my brother, Paul Hastings, for finishing out his basement in one week so I would have a place to write. My nieces, Karen Hastings and Abigail Hastings, and my nephew, Michael Hastings, who have kept me on my toes and provided constant entertainment through a variety of pranks, they deserve a lot of credit for putting up with me invading their house, using their computers and bossing them around whenever I was frustrated. I also want to thank my father, Jim Vermillion, for being willing to help anytime.

I also would like to individually thank my committee members who each provided important input to help me finish. My chair Larry Dooley has provided direction, encouragement, and friendship that were invaluable during this process. Dr. Toby Egan has been a great teacher and a good role model. Dr. Lloyd Korhonen was the man who put me on the path to pursuing my PhD. He asked me about my background

and career goals and then explained all about the HRD program. Dr. Korhonen also taught me a lot about the keys to working with technology and technical personnel. Dr. Larry Gresham has been a wonderful mentor and friend. My goal is to be exactly like Dr. Gresham and become the favorite marketing professor of students nationwide! I could not have completed my dissertation without the support of my wonderful committee.

There were many other people who have helped me throughout my graduate work. The Huddleston and Russell families have provided housing, food, and friendship for many years. My former roommates Mike Quennoz and Mark Fuelner introduced me to Buffy, Angel, Spike and many others who provided hours of entertainment and inspiration. Last but not least, John Creighton has always been there when I needed him.

Many others have contributed to this dissertation but they are too numerous to list. I think by borrowing the words of the Apostle Paul I can sum up the entire graduate school experience, “I have fought the good fight and finished the race...”

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## CHAPTER I

### INTRODUCTION

#### Career Center Historical Background

The Texas A&M University Career Center is responsible for teaching the job search process to over 42,000 current students and approximately 5,000 former students each year. The Career Center has 17 professional staff members available to assist students with learning the job search process. Five Career Services Coordinators are assigned to advise students in Business, Corps of Cadets, Engineering, Liberal Arts and Life Sciences. There are four experiential education staff members that focus on helping students with internships and cooperative education positions. The management team has five members and their primary focus is strategic planning and managing the implementation of programs. The Director of Placement has the most interaction with students through workshops and advising. Two professional staff members are devoted to working with employers and one is responsible for former student services.

The Career Center has seen consistent growth in the number of students seeking assistance. The following is a list of contact numbers for the 2001-2002 school year:

- 69,565 students advising sessions
- 24,341 student job interviews conducted at Career Center
- 7,065 internship interviews conducted at Career Center
- 9,295 students advised by Career Service Coordinators

---

This dissertation follows the style of *Human Resource Development Quarterly*.

- 23,938 students attended workshops hosted by the Career Center

These numbers include repeat visits by the same students.

It is becoming increasingly difficult to reach and train all students needing job search skills with the current Career Center staff. There are several factors working against the Career Center such as:

- Small number of staff compared to students needing to be trained
- Students are unable to attend training workshops during work hours
- Students have so many other commitments that they do not have time to attend workshops
- Due to different staff members training there is not a consistent message being taught at job search workshops
- Difficult to secure space for training
- Students prefer working from home or a familiar workstation

All of these factors are keeping the Career Center from teaching our students the skills they need to conduct a successful job search. These same problems are plaguing colleges and universities across the nation. During the 2001 National Association of Colleges and Employers (NACE) national meeting there was much discussion about obstacles in reaching and training students. Employers expressed concerns about the poor quality of resumes and interviewing skills of students.

The Career Center realized that something must be done to reach students with job skills training. Distance training is becoming increasingly important for corporations, non-profit organizations, government and universities. The lagging economy has driven

managers to find more cost effective ways to train. Technological advancements allow organizations to make choices about training that can lead to increased or improved performance. Universities worldwide are using technology to enhance their programs. San Diego State University developed a masters program using audiotapes, videotape, desktop videoconferencing and the Internet. Northwestern University's Institute for Learning Services developed a computer-supported program titled "Collaborative Visualization" project. They used desktop video teleconferencing, access to the Internet, a multimedia notebook with embedded templates for sharing information, and scientific visualization software. Both of these programs were very successful and can be used as models for other universities who want to capitalize on new technology (Schreiber & Berge, 1998). The Career Center management team unanimously decided to launch an initiative that would utilize technology to reach students. The management team assigned the responsibility of creating a strategic planning team and plan to the Director of Placement. This new project was called the technology initiative and was considered a top priority. This paper will be a case study focused on the strategic planning process moreover there will be discussion of the technology initiative as a byproduct of studying the strategic planning process.

### **Problem Statement**

There is a plethora of research and literature focusing on strategic planning yet few case studies have been done that describe the strategic planning process for university career centers. No effective strategic planning guide has been written to assist career center employees with building a strategic plan that will assist in reaching all

Texas A&M University students with job skills training. NACE conducts seminars and online workshops yet they are rehashing the same ideas, each year, which have not worked. Lists of these ideas are provided at national conferences and new employees get excited, yet year after year there has not been a concerted effort to provide strategic planning training.

Every year NACE hosts one week long Managers Training Seminar in different cities around the US. Top managers are nominated and then 15-20 are chosen to attend the seminar. In 2002 the training included a short one hour session on strategic planning. The other four days were devoted to topics such as, budgeting, ethics, technology, and database systems. Unfortunately every manager attending the seminar used a different system so many of the sessions were useless. There is no good place that career center Directors can go for assistance with the strategic planning process.

### **Purpose of Study**

The purpose of this study is to give a detailed account of the strategic planning process used by the Texas A&M Career Center to create the technology initiative. The study will also provide guidance to the researcher and others who will be developing similar initiatives in the future. In an effort to assist career centers nationwide it would be helpful for those career centers to look at others, like Texas A&M Career Center, who have already begun the strategic planning process.

### **Research Questions**

1. What strategic planning processes were used to create the technology initiative at the Texas A&M Career Center?

2. How congruent are these processes with the current strategic planning literature?
3. How can these processes be presented in such a way as to provide guidance or a conceptual model for others wanting to develop similar initiatives?
4. Can the research done by Rice (2002) be duplicated with the same results?

### **Operational Definitions**

*Strategic Planning* – Planning reflecting steps needed to meet strategic goals.

*Strategic Planning Process*- All activities involved in helping an individual, group or organization to achieve the desired outcome using objectives, strategies and tactics (Ebert, & Griffin, 2003).

*Texas A&M Career Center*- A non-profit organization on the Texas A&M University campus in College Station, Texas that provides job skills training and job search assistance to over 40,000 students and five thousand former students.

*Technology Initiative*- A project designed to use existing technology to reach all Texas A&M Career Center customers, this term will include all activities involved in designing this project.

*National Organization of Colleges and Employers (NACE)* - An organization whose primary purpose is to assist employers and colleges with any element of the job search process.

*Southwest Association of Colleges and Employers (SWACE)* – This is a regional branch of the national organization designed to assist employers and colleges with the job search process.

*Rocky Mountain Association of Colleges and Employers (RMACE)* - This is a regional branch of the national organization designed to assist employers and colleges with the job search process.

*SWOT*- Strengths, Weaknesses, Opportunities and Threats (Robbins & Coulter, 2002).

*Best Practice*- NACE award given to employers and colleges that provide new or outstanding ways of making the job search process easier, faster, or better.

*Benchmarking*- Measuring or comparing a practice or performance of one organization to another's (Aaker, 1998).

*Management Team*- Texas A&M Career Center has an Executive Director, Director of Placement, Director of Experiential Education, and two Associate Directors. (Appendix A)

*Director of Placement* – The researcher holds this position during the case study and is responsible for all technology at the Texas A&M Career Center.

*Job Search Process* – This would include any activity occurring while searching for a job including resume writing, networking, interviewing...

*AggieLaunch* – This is a proprietary database system created for the Texas A&M Career Center to enable students and employers to schedule interviews online.

*Education and Human Resource Development (EHRD)* – Degree program in the college of Education at Texas A&M University.

### **Assumptions**

The following assumptions are being made regarding this study:

1. The Texas A&M University Career Center has the expertise and knowledge needed to develop a strategic plan for the technology initiative. The Texas A&M Career Center has been awarded 5 Best Practice awards from NACE and has been asked to speak at future NACE technology meetings. The Director of Placement was asked by several peers to teach them the strategic planning process and has presented the strategic planning process at numerous sales meetings from 1990 - 2001.
2. Texas A&M Career Center personnel and outside vendors involved in the strategic planning process will be willing to discuss their experiences and share their insights.
3. The case study findings would lend themselves to the development of a conceptual guide or model that would help others involved in similar strategic planning processes.
4. The researcher will review and present data without excess personal bias.

### **Limitations**

1. This study is limited to the information acquired from literature review, Texas A&M Career Center online surveys, personal observation and written documentation acquired during the strategic planning process.
2. This study is based on perceptions and observation and results may be somewhat subjective.

### **Significance of Study**

This case study, which was conducted in a real life setting, is ideally situated to contribute to both theory and practice of human resource development. The results of this case study are relevant to employees of organizations and practitioners who are responsible for or involved in an organization's strategic planning process. Directors from other career centers may read this case study and recognize similarities to their initiatives and apply the findings to their situation. This case study will be significant to the researcher by providing insight and a basis for future strategic planning.

The knowledge base will be extended by presenting systems theory as a foundation to strategic planning. Researchers McLagan (1989), Watkins (1989), and Swanson and Holton (2001) have shown that systems theory is foundational to HRD. Other researchers, like Parry (1991) have developed models that show a systems perspective of integration of, HRD and strategic planning. This study will present a variety of theories to support the idea that system theory is foundational to strategic planning. This case study is significant because it will contribute to literature, theory and knowledge base of the strategic planning process.

### **Organization of Study**

Chapter I began with an introduction that included a brief history of the Texas A&M Career Center followed by the statement of the problem, research questions, definitions, assumptions, and limitations to assist in understanding the case study. Chapter II contains a literature review that will provide the foundation for this case study. The review includes definitions, theory, historical background in industry and

higher education, models, and the importance of strategic planning. Chapter III contains a detailed description of the methodology to be used in this case study. Chapter IV includes a detailed presentation of the case study and an analysis of this data. Chapter V focuses on conclusions from the case study, implications, recommendations and suggestions for future study.

## **CHAPTER II**

### **REVIEW OF LITERATURE**

#### **Definitions of Planning**

There are many terms that are used in profit and non-profit organizations and in the literature for these organizations to describe the activities that guide an organization to meet its expectations. Benveniste (1989) used the terms planning and policy analysis while Zaltman, Florio, and Sikoski (1977) used the phrase planning for intentional change to describe strategic planning. Senge (1990), Drucker (1995), Bryson (1995), Hughes (1997), and Shapiro and Nunez (2001) used the term strategic planning to refer to the entire planning process.

Bryson (1995) believes that strategic planning considers the many divergent beliefs and values within an organization and encourages communication and participation amongst the different factions to promote more reasonable and analytical solutions and decisions. According to Hughes (1997) a strategic plan is the means by which organizations can establish long-term common values, purpose, direction and action. Strategic planning is synonymous with strategic management and means a process, by which the organization plans, operates, controls, or monitors and finally evaluates an on-going basis for all its activities and functions. Senge (1990) says that an organization cannot foster a proactive environment without the process of strategic planning. Drucker (1995) explains that strategic planning is a continuous systematic process.

## **Theory of Planning**

There are several interrelated theories such as; general system theory, cybernetics theory, chaos theory and complex adaptive systems theory to name a few, that have been derived from scientific disciplines that are foundational to strategic planning. Systems theory is the overarching theory that encompasses each of the theories listed above.

Ludwig von Bertalanffy is called the father of the system theory and he created a theory to unify many different fields. General system theory is concerned with multiple disciplines on the wholes, parts and the relationships of the systems to their environment - the structure of a system. "Cybernetics is the science of information, communication, feedback and control both within a system as well as between a system and its environment" (Swanson, & Holton, 2001, p. 115). There is more focus on how the system functions rather than structure. Chaos theory tries to understand the pattern in seemingly random behavior. Complex adaptive systems theory has emerged from chaos theory and explores the idea that systems function in an area between order and chaos. Furthermore, systems in this state conduct self-organizing and learning processes, which include structural change through self-renewal (replication, copy, and reproduction), non-linear flows of information and resources, and far-from-equilibrium conditions that create a dynamic stability where paradox abounds (Watkins 1989).

The ontological view using system theory is that the world is made up of sets of interrelated components that when viewed as a whole have properties that do not exist in any of the sets. The epistemological view is that systems are mental constructs seeing the world in a more holistic way, looking at all of the parts together rather than separately.

The somewhat indescribable meaning of system theory when they state: systems sciences defy classification as constituting either an epistemology or ontology. Rather they are reminiscent of the Greek notion of gnosis concerned with holistic and integrative exploration of phenomena and events. There are aspects of the systems approach that are ontological and aspects that are epistemological, and aspects that are at once both and should not be circumscribed to either (Swanson, & Holton, 2001, p. 116).

Strategic planners should embrace system theory because organizations are systems and the theory provides information regarding the structure, behavior, change process and future of systems. The system theory gives strategic planners capabilities to understand the wholes and complexity, methodologies for analysis and modeling and problem solving approaches.

### **Historical Background**

Strategic planning began in the military and was used in the planning and direction of large-scale military operations. The word strategy is derived from the Greek word *strategos*, which means general of an army or the art of commanding, or the plan to defeat ones enemy (Keller, 1983). In the early 1920s Harvard Business School developed the Harvard Policy Model one of the first strategic planning models for private organizations. This model defined strategy as a pattern of purpose and policies defining the organization and its business. According to McCune (1986), General Electric was one of the forerunners in the adoption of strategic planning in the 1960s.

Strategic planning became a field of study in the late nineteenth century. There was a need for designing urban areas to ensure that roads, railways, housing, and commercial areas all fit together in a way that made sense and allowed for future expansion. It was important for planners to take a more scientific overview that studied various alternatives to be prepared for all foreseeable outcomes (Benveniste, 1989).

Strategic planning has evolved since the 1960s. The key is that strategic planning continues to develop and is seen by many as the mainstay of management. During the 1980s, the public sector ignored strategic planning and was seemingly unaware of customers, marketing, market share and risk management. During the 1990s, Mintzberg (1994) felt that corporate America was obsessed with strategic planning and management was putting too much focus on strategic planning.

Change became the new buzzword and planning models had to build flexibility, change process, strategic thinking, and organizational learning, into their models. The saying, “it doesn’t matter what track you are on, if you are not moving you will get run over,” was the battle cry. Organizations believed that continuous change and the ability to transform were the keys to success (Gouillart, 1995).

The strategic planning process has continued to evolve and has been adopted by public, private and non-profit organizations. The models have gone from focusing on setting and achieving objectives to including strategic alternatives, opportunities, threats and long-term planning. Through time the different models have become more similar and focus on analysis, defining goals and objectives, and uncovering the alternative ways for achieving their goals.

### **Importance of Planning**

There have been conflicting reports about the success of strategic planning. Thune and House (1970) studied 36 organizations involved in strategic planning and those not involved in strategic planning. The study compared the organizations before and after performance based on economic performance measures such as, sales and stock prices. The conclusion was that the strategic planners outperformed the non planners and the organizations that implemented strategic planning performed better after they began strategic planning. Fulmer and Rue (1974) disagreed and said, "This preliminary study does indicate that there is no simple, across the board relationship between the financial success of the firm and its use of long-range planning (p. 7)." Researchers in the next few decades, across many industries, continued to disagree about the usefulness of strategic planning (Armstrong, 1982; Hofer, 1976; Pearce, Freeman, and Robinson, 1987). Many of these researchers agreed that research does support the hypothesis that strategic planning is useful. In one of the more recent reviews Boyd (1991) states that the effect of strategic planning is still not clear. Boyd does conclude that, " while the average effect size is small, many firms do report significant, quantifiable benefits from participating in the strategic planning process (Boyd, 1991, p. 369)." It appears as though researchers want a simple answer to a very complex problem. The system theory discussed earlier in this chapter shows that there are not only many parts that must be taken into account but also the interactions between these parts. Even though there have been conflicting reports and even prediction of the demise of strategic planning (Mintzberg, 1994), it is still being utilized in organizations of all sizes.

Lelong and Shirley (1984) feel that strategic planning is extremely important for two reasons. First, the strategic planning process itself forces the organization to communicate and go deeper than the sometimes insignificant surface problems that cloud issues to the underlying information that is needed to grow. Second, the strategic planning process draws the attention of individuals within the organization and helps them all focus their energy on common goals. Strategic planning allows, “the organization to gain greater control over its destiny, greater capacity to bring about some events and avoid others, and greater ability to adjust constructively to those events it cannot control (Lelong, & Shirley, 1984, p. 2)” so achievement is enhanced (Rice, 2002).

### **Strategic Planning Models**

The literature on strategic planning provides a seemingly endless variety of models. The following list of models is by no means exhaustive yet it is representative of the models found in the literature review. The following models are explained using a variety of methods including, diagrams, numbered lists, or detailed explanations.

#### *Basic Model*

Used by inexperienced very busy small organizations usually led by top management.

1. Identify your purpose (mission statement)
2. Select the goals your organization must reach if it is to accomplish your mission

3. Identify specific approaches or strategies that must be implemented to reach each goal
4. Identify specific action plans to implement each strategy
5. Monitor and update plan (McNamara, 1999)

#### *Issue Based Model*

Organizations using the basic model may grow into using the issue based model.

1. External/internal analysis to identify SWOT
2. Strategic analysis to identify and prioritize major issues
3. Design major programs to address issues
4. Design/update vision, mission and values
5. Establish action plans (objectives, resource needs, roles and responsibilities for implementation)
6. Record everything in one place
7. Develop the yearly operating plan document
8. Develop and authorize budget for one year
9. Conduct year one operations
10. Monitor/review/evaluate/update strategic plan document (McNamara, 1999)

#### *Alignment Model*

This model is useful for organizations experiencing a large number of internal issues and strategies that are not working.

1. The planning group outlines the organization's mission, programs, resources, and needed support
  2. Identify what is working well and what needs adjustment
  3. Identify how these adjustments should be made
  4. Include these adjustments as strategies in the strategic plan
- (McNamara, 1999)

### *Drucker Model*

Organizations from the public sector use this business model to answer five important questions. The model is focused on results and targets performance standards to measure success.

1. What is our mission?
2. Who is our customer?
3. What does our customer value?
4. What are our results?
5. What is our plan? (Drucker, 1995)

### *Management by Objectives(MBO)*

George Ordione built on Drucker's work and created MBO's in the late sixties. During the 1970s most organizations, who considered themselves forward thinking, were using some form of MBO's. Management by objectives means that subordinates sit down with their boss and agree upon a set of objectives with timeframes for their job. The assumption with MBO's is that if organizations can get people to focus on output

rather than activities their productivity will increase. Using the MBO process involves the following steps.

1. **Central objective setting.** The first basic phase in the MBO process is the defining and clarification of the organizational objectives. These are set by the central management, usually in consultation with the other managers. Such objectives should be specific and realistic, and thus controllable. This process gets the group managers and the top managers jointly involved. Once these objectives are clearly established they should be made known to all the members of the organization and be fully understood by them.
2. **Manager-subordinate involvement.** After the organizational objectives have been set and defined, the subordinates work with the managers in setting their individual objectives. Such joint consultation is important because people are much more motivated in achieving objectives that were set by them to start with. The objectives of the subordinate work unit are specific and short range and primarily indicate what the unit is capable of achieving in a specific period of time. The subordinates must set individual objectives in consultation within the unit. In this manner everyone gets involved in the objective setting.
3. **Matching objectives and resources.** The objectives in themselves do not mean anything unless we have resources and means to achieve

them. The role of the management is to make sure that the subordinates are provided with necessary tools and materials to effectively achieve the objectives. If the objectives are precisely set the resource requirements in their turn can be precisely measured, making the resource allocation easier. However, just like objective setting, the allocation of resources should be done in consultation with the subordinates.

4. Freedom of implementation. Once it is made clear what should be performed and why, the manager-subordinate task force should have adequate freedom in deciding on how to perform it. They should be entrusted to know how to best utilize the organizations resources and means to achieve these objectives. As long as these means are within the larger framework of organizational policies, there should be minimum interference by the superiors. At this stage the heavy work invested in setting objectives and planning performance is paid back, as the need for intensive supervising is no longer there.
5. Evaluation and appraisal of performance. There should be periodic reviews or evaluations of progress between the manager and the subordinates. These evaluations would determine if the co-worker is making satisfactory progress. They will also reveal if any unanticipated problems have developed. They also help the subordinates understand the process of MBO better and help improve

their morale, since the manager is showing active interest in their work and progress. It is important that the performance appraisal is based upon fair and measurable standards. Essentially, only performances can be measured, and if the values of the co-workers are going to be measured that has to be conducted by way of their performances. The attempt at blunt measurement of loyalty is the hallmark of the corrupt system. Reviews will often help reveal that either the objectives or the methods have to be improved. And the circle is closed (Hansson, 2003).

Unlike many management fads of the 1960s and 1970s, there is still a lot of value in setting objectives. MBO should not be lumped together with assessment centers, transactional analysis, organization development, and The Managerial Grid. Those were fads which, for several thousand dollars a pop, gave us a new vocabulary but little else. MBO, on the other hand, still remains a good proactive mechanism to be used within the processes of planning.

#### *Ansoff Model*

There are two main concepts with this model, gap analysis and synergy. Gap analysis helps evaluate the difference between where the organization is now and where they want to be at the end of their plan. Synergy refers to the idea that the organization should use combined events that are greater than the sum of their parts, more commonly known as the system theory (Ansoff, & Stewart, 1967).

*Harvard Policy Model or SWOT Analysis*

An exhaustive list of the organizations internal strengths and weakness as well as the external threats and opportunities is made. These strengths, weaknesses, threats and opportunities are then combined with the organizations values and are evaluated to make the best choice of strategies to move forward (Figure 1).

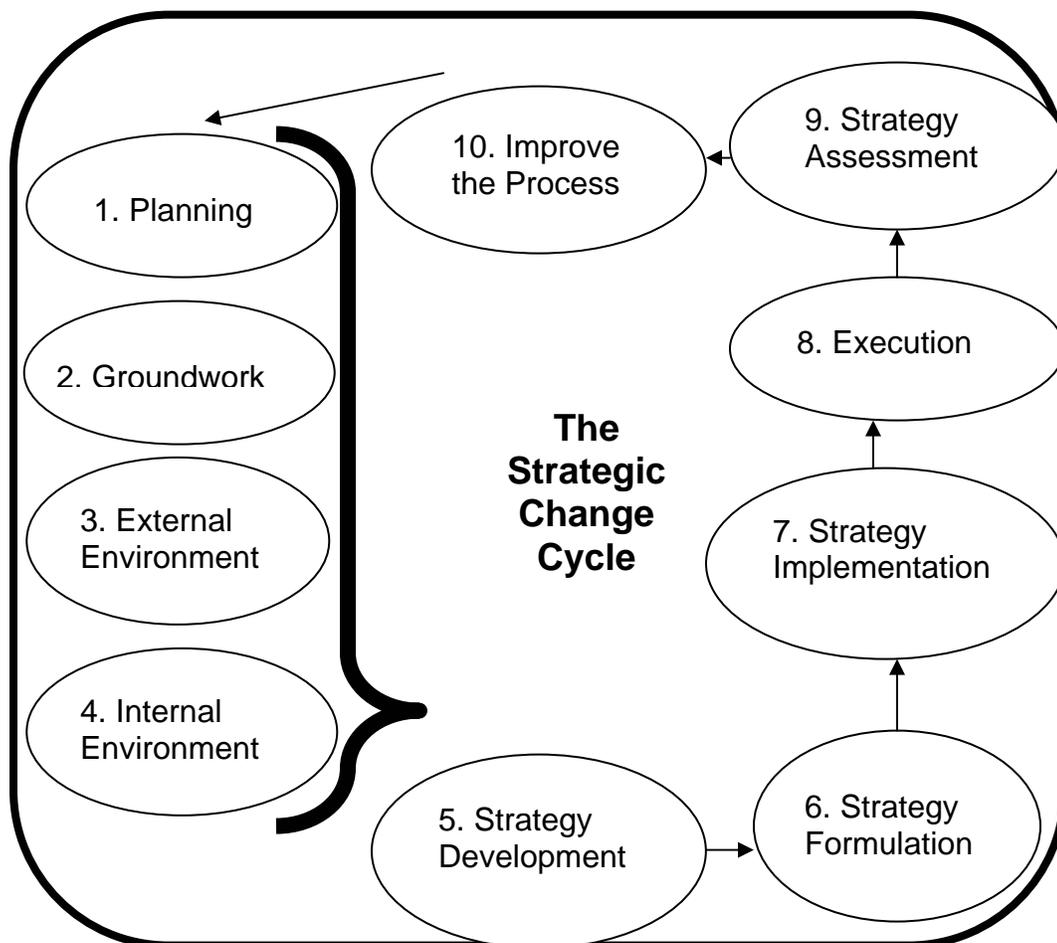
**Figure 1. SWOT Analysis Model**

<b>Strengths</b>	<b>Opportunities</b>
<b>Weaknesses</b>	<b>Threats</b>

*Strategic Change Cycle Model*

John M. Bryson developed this sequential process to develop a complete organizational assessment and strategic plan. The model is very flexible and allows organizations to enter the strategic planning process at any stage (Figure 2).

**Figure 2. Strategic Change Cycle**



*Bourgeois and Brodwin*

The following illustrates five strategic planning models and uses the CEO's role and the central question asked by the different types of CEO's (Table 1).

**Table 1. Bourgeois and Brodwin's Five Models**

Model	CEO's Strategic Question	CEO's Role
Commander	How do I formulate the optimum strategy?	Rational Actor
Change	I have a strategy in mind, now how do I implement it?	Architect
Collaborative	How do I involve top management to get commitment to strategies from the start?	Coordinator
Cultural	How do I involve the whole organization in implementation?	Coach
Crescive	How do I encourage managers to come forward as champions of sound strategies?	Premise-setter and Judge

### *Total Quality Management (TQM)*

Dr. W. Edwards Deming was the originator of many of the TQM concepts.

Deming was an American statistician who led the Japanese recovery of industry after World War II. TQM is not really a strategic planning model but the points made by Deming are an integral foundation of many strategic planning models. The following is a summary from Chapter 2 of the book *Out of the Crisis*, by W. Edwards Deming:

The 14 points for management in industry, education and government follow naturally as application of this outside knowledge, for transformation from the present Western style of management to one of optimization. The 14 points are the basis for transformation of American industry. It will not suffice merely to solve problems, big or little. Adoption and action on the 14 points are a signal that the management intends to stay in business and aim to protect investors and jobs. Such a system formed the basis for lessons for top management in Japan in 1950 and in subsequent years. The 14 points apply anywhere, to small organizations as well as to large ones, to the service industry as well as to manufacturing. They apply to a division within a company. The 14 points:

1. Constantly try to improve product.
2. Take on the responsibility of leadership. Recognize and embrace the challenge of the new economic age and adopt the new philosophy wholeheartedly.
3. Stop relying on inspections to create quality. Build quality into the product from the beginning so there is no need for mass inspections in the first place.

4. Stop awarding business on the basis of price tag. Lower the total cost instead. Move toward a single supplier for any one item, on a long-term relationship of loyalty and trust.
5. Constantly and forever work to improve the system of production and service, to improve quality and productivity, and thus constantly decrease costs.
6. Train employees on the job.
7. Set up leadership (see Point 12). Supervision should be to help people and machines and gadgets to do a better job. Supervision of management is in need of overhaul, as well as supervision of production workers.
8. Drive out fear, so that everyone may work effectively for the company.
9. Break down barriers between departments. People in research, design, sales, and production must work as a team, to foresee problems of production and in use that may be encountered with the product or service.
10. Eliminate slogans, exhortations, and targets for the work force asking for zero defects and new levels of productivity. Such exhortations only create adversarial relationships, as the bulk of the causes of low quality and low productivity belong to the system and thus lie beyond the power of the work force.

- Eliminate quotas on the factory floor because they do not give employees incentive to work smarter. Substitute leadership.
- Eliminate management by objective. Eliminate management by numbers, numerical goals. Substitute leadership.

11. Remove barriers that rob the hourly worker of his right to pride of workmanship. The responsibility of supervisors must be changed from sheer numbers to quality.

12. Remove barriers that rob people in management and in engineering of their right to pride of workmanship. This means, abolishment of the annual or merit rating and of management by objective.

13. Institute a vigorous program of education and self-improvement.

14. Put everybody in the company to work to accomplish the transformation.

The transformation is everybody's job (Deming, 1986).

*Caffarella Interactive Model of Program Planning*

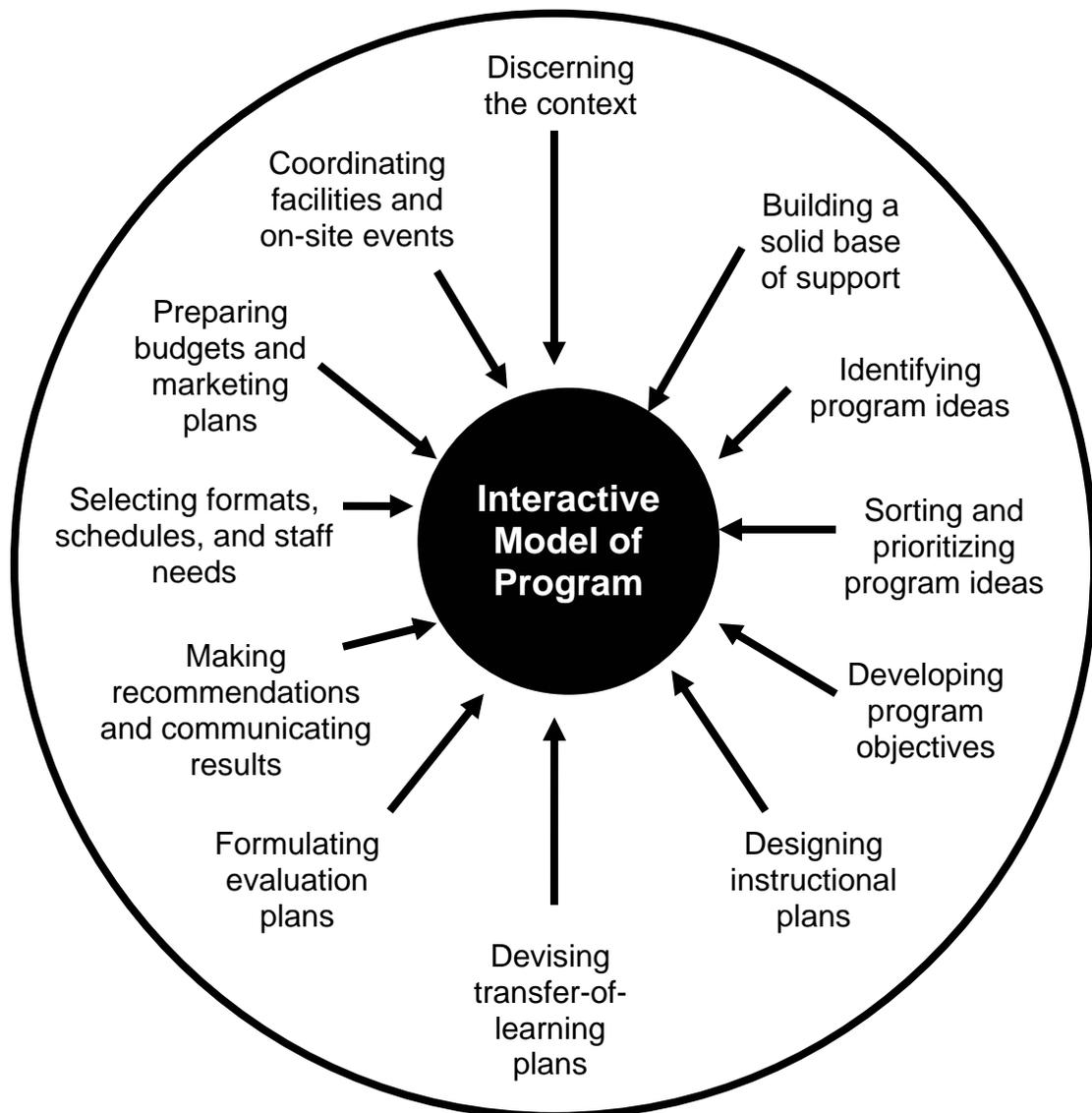
This model is based on the following seven assumptions:

1. Educational programs focus on what the participants actually learn and how this learning results in change.
2. The development of educational programs is a complex and not necessarily sequential interaction of institutional priorities, tasks, people, and events.

3. Program planning is contextual in nature: social, economic, cultural, and political climates will have an impact on individual program planners.
4. Both preplanning tasks and last-minute decisions are necessary when planning programs.
5. Effective planning requires respect and honor for diversity and cultural differences.
6. Individual program planners work differently and there is no single method of planning education that ensures success.
7. Program planners are learners, too; reflection and evaluation will strengthen individual abilities. (McNamara, 1999)

Caffarella's model presents a more dynamic planning process and is an alternative to linear, step-by-step models. This allows for more flexibility that is usually needed in real world situations (Figure 3).

**Figure 3. Caffarella Interactive Planning Model**



### **Pitfalls of Planning**

Ihara Saikaku, a writer in Japan during the 17<sup>th</sup> century, wrote, “There is always something to upset the most careful of human calculations.” Robert Burns, bard of the 18<sup>th</sup> century coined the commonplace phrase, “the best laid schemes of mice and men.” Planning cannot guarantee the outcome you are striving to achieve (Goldbard, 2003). After going through their strategic planning process the National Endowment for the Arts wrote a series of articles to assist in future planning. The following list of pitfalls was created by Goldbard to help others avoid making mistakes when going through the planning process:

1. Planning is only as good as the information on which it is based. –  
Many times planners rely on untested theories and ideas or assumptions. Information is the foundation on which a plan is being built so it is important to have good reliable information. The planner should verify all information and not allow phrases like “it is obvious to everyone” be the foundation for planning.
2. Planning is not magic; you can’t always get what you want. -  
Frequently, organizations contemplating new initiatives - a program, a facility, staff expansion - begin by writing the last page of their plans, the one where everyone lives happily ever after. But the process of planning is one of research and investigation. Results can no more be predetermined than can the outcome of a scientific experiment.  
Considering a major expansion of activity means taking stock of

organizational readiness in many ways. Is there a need for the new activity? An audience or constituency? Do you have access to the expertise? The material resources? The time required to do it right?

Planning is a tool that can help you decide whether to go forward, not just how. If the answers to key questions are "no," then the outcome of planning should be to postpone the contemplated expansion, working toward readiness to tackle it farther down the road.

3. Adaptable beats obdurate any time. – Planners must create a plan that allows for future expansion and flexibility. It is important to keep an open mind while planning and be willing to accept that the first original idea may be tweaked and upgraded multiple times over the course of the planning process. A plan should not be written that does not allow for change.
4. Put planning in its place and time. - Some groups don't recognize that it takes time and effort to plan well. They want the results, but aren't able or willing to make the investment. They end up in the worst of both worlds: their ongoing work is set back because they took time to plan without thinking through the implications; and their too-rushed plans end up half-baked ideas. Be realistic about what you can invest. Find a way to plan that suits your available resources - time, energy, and money.

5. Too much of a good thing: planning can become a substitute for action. – The leader of an organization must set a deadline for implementing the plan. The plan has been written in such a way that changes can be made so do not get caught in the trap of creating the perfect plan. There is no perfect plan.
6. What goes around comes around: groups can be blindsided by the issues that planning reveals. - When an organization pauses to plan, all of the dirt that has been brushed under the carpet surfaces. There could be problems between managers regarding ownership of certain projects. Investigation of workplace culture could lead to staff members choosing sides and starting a war before the plan is even started to take shape. When an organization undertakes to plan, everyone should be made aware that issues may arise that need talking through, that there may be moments of heat, struggle, and even head-on collision. Your planning process should include the time, focus, and talent for the mediation needed to resolve conflicts, so you can turn to face the future as a team.
7. Boilerplates and cookie cutters are the wrong tools for this job. – Some planners want to adopt a model that is specific to their industry for planning. Looking at models is a great start but every organization has their own idiosyncrasies that should be examined and built into

the planning process. In planning it is important to customize your plan to fit your organization.

8. Writing up in planspeak rather than plain language undoes the good of planning. – When writing your plan or even taking notes during your planning process it is important to write clear sentences that can be understood when read by somebody else at a later date. During the planning process it is easy to get caught up in the lingo the team is using and not realize that others do not understand what it means. Immediately after each session a team member should be assigned to write a follow-up page that explains the outcome of the meeting in a way that non-team members can understand. At the end of the process the team should have a written document that outlines the plan in clear easily understood language (Goldbard, 2003).

### **Strategic Planning in Higher Education**

Zaltman, Florio, and Sikorski (1977) feel that planning is the most important step for successful adoption, implementation and institutionalization of educational change. The idea of strategic planning is relatively new for higher education in America. In the years before World War II colleges and universities experienced a long period of steady growth and development in a large part due to accretion (Peterson, 1986). After the War enrollment increased dramatically, operations and facilities were growing and the organizations struggled to meet the new management demands. The management

practices of the past often very informal and poorly suited to the new environment (Keller, 1983).

By the seventies it was apparent that federal support was not the answer and higher education was going to have to turn to something new. “The thick deep adherence to the kind of incrementalism with which institutions had long been comfortable made it difficult for new ideas about planning and management to take root” (Keller, 1983, p. 106). Higher education began to adopt strategic planning models from industry. There were problems adapting these models because in higher education the efforts are generally more highly centralized with strong presidential control. During the 1980s there were many changes as a result of new technology. This new technology was not limited to computers and computer equipment. There were new programs available to assist with the decision making process as well as new systems to enhance analysis. The key in the 1980s was managing information. The following table shows two views of the planning eras in higher education during the 1970s and 1980s (Table 2).

In the last few years institutions of higher education have faced endless changes in their internal and external environments. Challenges such as decreasing financial support, changing demographics, outdated programs, and rapid technological growth are realities that higher education institutions must confront (Shirley, 1988). Many institutions of higher education have found it beneficial to turn to strategic planning (Rowley, Lujan, and Dolence, 1997). Glassman and Rossy, (n.d.) stated institutions that do not rethink their roles, responsibilities, and structures can expect a very difficult time in the next decade. Institutions will be compelled to become more

**Table 2. Two Views of the Planning Eras of 1970s and 1980s**

	<b>1970s</b>	<b>1980s</b>
	<b>Fragmentation, Formalization</b>	<b>Consolidation, Sophistication</b>
<b>Problems</b>	Constraint, reduction	Decline, uncertainty
<b>Needs</b>	Efficiency	Effectiveness
<b>Planning:</b>		
• <b>Purpose</b>	Problem solving	Renewal
• <b>Emphasis</b>	Technique, process	Strategic
• <b>Orientation</b>	Internal	External

	<b>Age of Pragmatic Application</b>	<b>Age of Strategic Redirection</b>
<b>Conditions</b>	<ul style="list-style-type: none"> <li>• Stabilizing enrollments</li> <li>• Revenue shortfalls</li> <li>• Need to reallocate resources to deal with imbalances caused by 1960's growth</li> <li>• Selective growth and retrenchment and promise of decline in 1980's</li> <li>• Goal fragmentation</li> </ul>	<ul style="list-style-type: none"> <li>• Decline in traditional college cohorts, increase enrollment</li> <li>• Substantial variations</li> <li>• Resource shortfalls</li> <li>• Change in student characteristics</li> <li>• Need to invest, computer equipment, capital plant</li> </ul>
<b>Primary Focus</b>	<ul style="list-style-type: none"> <li>• Internal orientation</li> <li>• Existing programs</li> <li>• Resources</li> <li>• Efficiency</li> <li>• Recruitment</li> <li>• State relations</li> </ul>	<ul style="list-style-type: none"> <li>• External orientation</li> <li>• Effectiveness</li> <li>• Quality</li> <li>• Outcomes</li> <li>• Competitive advantage</li> <li>• Economic development</li> </ul>
<b>Nature of Institutional Decision Making</b>	<ul style="list-style-type: none"> <li>• Reallocation mentality</li> <li>• Incremental, imperfect decision making</li> <li>• Some use growth in late 1970's to prepare for 1980's</li> <li>• Others wait for conditions to get bad to act</li> </ul>	<ul style="list-style-type: none"> <li>• Proactive to environment</li> <li>• External affects internal</li> <li>• Harsh penalties for poor or no decision</li> <li>• More analysis and decision support systems</li> <li>• Info. management key</li> </ul>
<b>Nature of Planning and Strategy Formulation</b>	<ul style="list-style-type: none"> <li>• Comprehensive master plans</li> <li>• Program planning and evaluation</li> <li>• Resource reallocation</li> <li>• Management of decline</li> <li>• New techniques and advances in management science applications</li> <li>• Planning as a staff function</li> </ul> <p>Strategic management emerges in late 1970's</p>	<ul style="list-style-type: none"> <li>• Strategic planning gains popularity</li> <li>• Re-emergence of master planning</li> <li>• Selective focus on new clienteles, partners, relationships</li> <li>• Experience with shortcomings of analysis and planning</li> <li>• Emphasis on applications rather than techniques</li> <li>• Planning as line function</li> </ul>

introspective and analytical, to undertake to set priorities and develop strategies, overcome institutional inertia and make long overdue choices – for example, to identify areas of growing student interest and create new programs to replace those for which demand may have fallen off (Shirley, 1983).

The Texas A&M Career Center is facing the very situation described above. If there are not some significant changes the Texas A&M Career Center could be dismantled and their responsibilities turned over to each academic college. There are already many institutions of higher education that have chosen to do this very thing, including The University of Texas in Austin – one of Texas A&M Career Centers biggest competitors in assisting students with the job search process. The University of Texas is considered competition because there are a limited number of employers recruiting students from the state of Texas. The management team at the Texas A&M Career Center has recognized that effective strategic planning is crucial and is looking forward to the results of the technology initiative.

### **Approaches to Planning**

Planners, like managers, use different approaches to planning. The management box below shows four distinct styles of management. The reviewer has altered the original drawing to show that one side of the box is descriptive while the other side is prescriptive (Figure 4).

**Figure 4. Adapted Management Style Table**

Descriptive	Prescriptive
<b>Management by Communication</b>	<b>Management by Objectives</b>
<b>Management by Vision</b>	<b>Management by Command</b>

Management by command is where the manager gives the subordinate step-by-step instructions and does not allow any deviations. Management by objectives is both a planning and management style and although it encourages participation the end result is a step-by-step plan that the manager approves if it is based on reaching objectives set from the top down. On the other side, management by communication and vision allows subordinates to decide the best way to achieve their objectives. The assumption is that subordinates are professional staff members who can make good decisions that will lead to the desired results.

Descriptive and prescriptive are the two main approaches used by most planners. The reviewer has a bias toward the prescriptive model due to the time spent working for organizations such as Proctor & Gamble Distributing Company and Black & Decker. Both of these companies used MBO's and encouraged all employees to follow the plan without deviation. While working on this literature review the reviewer has been surprised by feelings that perhaps there is room for the descriptive models that allow for more flexibility. Mintzberg (1987) considers planning more of an art than a science, an art that allows the planner to craft a plan that fits the specific needs and unique characteristics of the organization. Norris and Poulton (1991) refer to prescriptive and roadmap models rather than prescriptive and descriptive. The roadmap means there are several different routes that can help reach the final destination. The route the planner chooses depends upon what the organization is looking for, shortest route, fastest route, or the most scenic route. Benveniste (1989) presented normative theory approaches that illustrate what planners should do while the real-world theory approaches illustrate what planners actually do. Cafferella created the interactive model (Figure 4) that provides more flexibility that is needed in real-world situations.

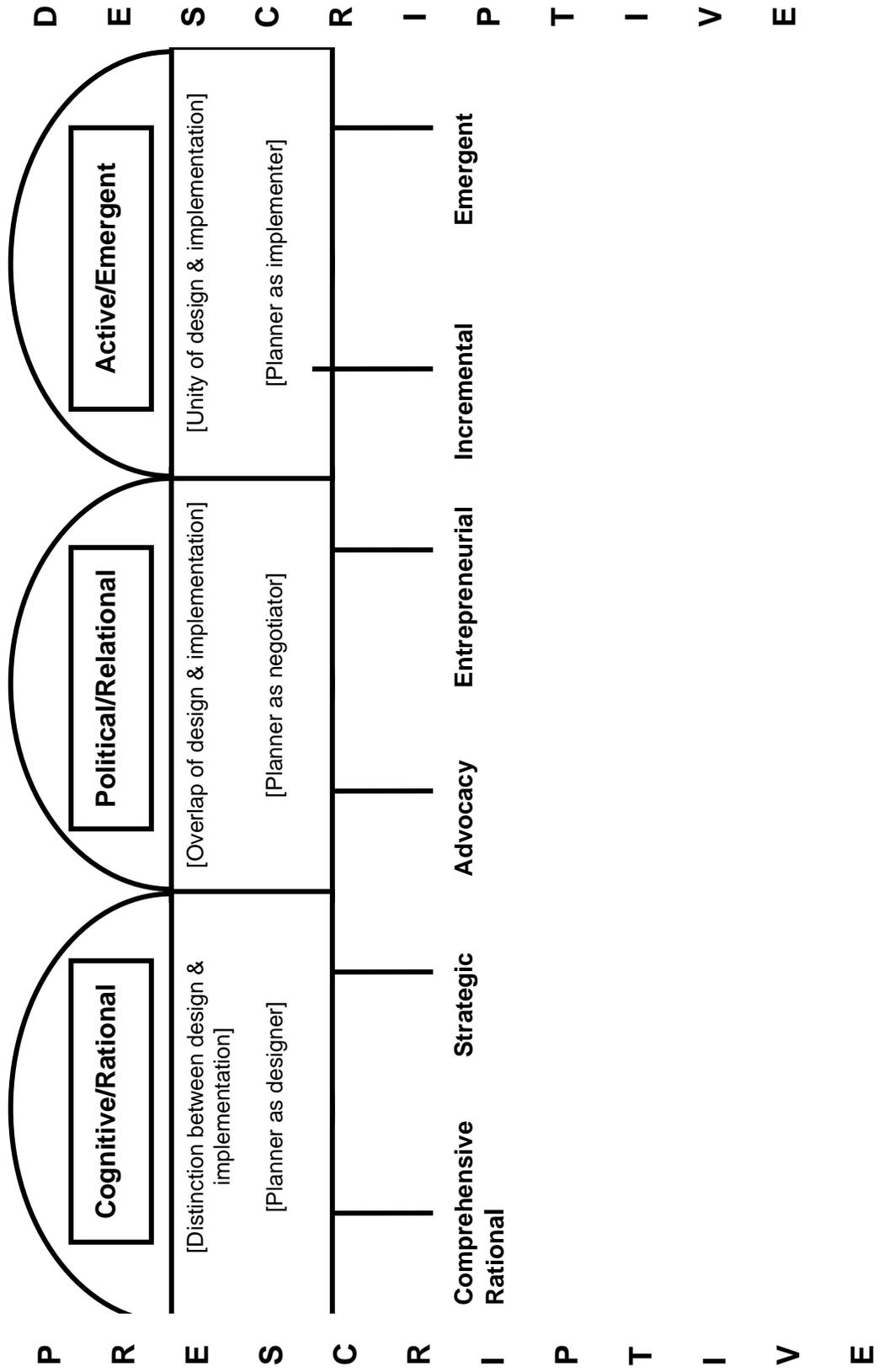
Rice (2002) uses a continuum to illustrate approaches to planning that are of particular interest and they do not always fit in one category. The continuum is similar to the adapted management style table above but is more detailed (Figure 5). Rice includes three categories in her continuum, "Cognitive/Rational, Political/Relational, and Active/Emergent" and uses the term umbrella to describe the area under each of the

categories. The continuum has several levels to help explain exactly what happens during the planning process and where the planner fits in each category.

On the far left of the continuum Rice placed prescriptive and Cognitive/Rational. Under the Cognitive/Rational umbrella the primary focus is on the formulation or thought portion of the planning process. “This approach is comprehensive in that it is a systems approach, and rational in that it outlines a logical set of procedures to be followed. These approaches have a linear look to them, and include the basic steps of goal clarification, systematic analysis, generation of alternative courses of action, establishing criteria for choosing among alternatives, choosing, implementing, and monitoring” (Rice, 2002). Strategic planning is under the Cognitive/Rational umbrella but is over to the right because it forms a bridge between Cognitive/Rational and Political/Relational. Planner and upper management are generally the ones involved in strategic planning and the emphasis is on setting goals, designing the plan and analyzing strengths, weaknesses, opportunities and threats as illustrated in the strategic planning models section of this study. Strategic planning recognizes the importance of getting buy in from stakeholders and encourages input in the planning process (Benveniste, 1989; Shapiro & Nunez, 2001; Norris & Poulton, 1991; Bryson, 1995).

The Political/Relational umbrella planning approaches focus on internal and external stakeholders and begin moving away from prescriptive toward descriptive.

Figure 5. Rice 2002 Planning Approach Continuum



Under this umbrella the planner is involved in the implementation stage of the process. The planner is responsible for bringing together a variety of stakeholder interests and negotiates the best design for successful implementation. Planners are trying to present a more realistic view of planning and they recognize the importance of relationships in a successful planning process. There is an open acknowledgement among researchers that the planning process is political in nature. “Whereas the Advocacy approach is heavier on the political or power relationships, the Entrepreneurial approach places more emphasis on community relationships, striving to create a sense of equality (Benveniste, 1989).”

At the far right of the continuum is the Active/Emergent umbrella. This is where the planner and implementer are merged into one. Planning is viewed as an art rather than a science. Incrementalism is just a matter of taking small steps and not moving forward too quickly, and making minor adjustments as needed. This type of planning does not require extensive thought and total understanding of the organization. There is no drastic departure from the past so it is easier to make decisions. The Emergent approach is on the far right of the continuum and it means that there is no real plan action drives thinking and a strategy emerges (Rice, 2002).

Rice found the continuum to be a useful tool for illustrating the important elements and categories of the planning process. In her study Rice found that more than one approach was used in her planning process. This writer expected to find that strategic planning was the approach used to create the technology initiative at Texas

A&M Career Center. This is why the writer placed so much emphasis on strategic planning during the literature review.

### CHAPTER III

#### METHODOLOGY

A descriptive case study design was chosen because it adds strength to what is already known and also helps explain complex issues. Case study research gives an in-depth contextual analysis of a limited number of events. The study of the planning process is very complex and case study research is one method that can be used to bring deeper understanding and add strength to what we already know about the planning process (Dooley, 2002). Qualitative research methods were used in this study. Strauss and Corbin (1990) give a simple definition and state that qualitative research is any kind of research that does not use statistics to reach findings. Denzin and Lincoln (1998) give a more in-depth definition:

Qualitative research is multimethod in focus, involving an interpretive, naturalistic approach to its subject matter. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them. Qualitative research involves the studied use and collection of a variety of empirical materials; case study, personal experience, introspective, life story, interview, observational, historical, interactive, and visual texts that describe routine and problematic moments and meanings in individuals lives.

The goal of the qualitative researcher is to develop understanding, describe the multiple truths, and generate findings while staying focused on process and meaning. Qualitative

researchers should be able to gather large amounts of data, learn from them, adjust their thinking, and then synthesize the data for the purpose of gaining further understanding.

Dooley (2002) uses Yin's work to define case study research as "scholarly inquiry that investigates a contemporary phenomenon within its real-life context, when the boundaries between phenomenon and context are not clearly evident; and which multiple sources of evidence are used" (p. 335-336). Merriam (1988) states, "qualitative researchers are interested in ... how people make sense of their lives, what they experience and how they interpret these experiences..." (p. 19). This case study attempts to provide the reader with insight about what to do or not to do when facing a similar situation.

### **Design of Study**

Bogdan and Biklen (1992) say a case study is "a detailed examination of one setting, or one single subject, or one single depository of documents, or one particular event" (p. 58). This case study is a descriptive case study that according to Merriam is "one that presents a detailed account of the phenomenon under study...case study researcher gathers as much information about the problem as possible with the intent of interpreting or theorizing about the phenomenon" (p. 28). The study was conducted using the six elements outlined by Dooley (2002):

- Determine and define research questions
- Select the case and determine data gathering and analysis techniques
- Prepare to collect data
- Collect data in the field

- Evaluate and analyze data
- Prepare the report (p. 338-339)

### **Selection of Case**

A good case will usually be taken from a real life situation and includes; setting, individuals involved, what happened, including the conflicts and problems. According to Kardos & Smith in 1979 the facts must not be changed to reflect what should have been done rather than what was done (Dooley, 2002). The researcher chose the technology initiative at the Texas A&M Career Center because the topic is one that has been generating a lot of interest in other Career Centers across the nation. At the 2001 National Association of Colleges and Employers annual meeting there was constant discussion about planning technology initiatives to assist students. As Director of Placement at the Texas A&M Career Center the researcher has the unique position of being able to observe up close the actual events and behind the scenes thinking going into planning a technology initiative.

### **Validity and Reliability**

“Case study research, like all other forms of research, must be concerned with issues such as methodological rigor, validity, and reliability” (Dooley, 2002, p. 338). The following is an explanation of how this study used the six elements presented by Dooley (2002) to insure validity and reliability.

1. **Determine and define the research questions.** Establishing the focus of this study was the first step. After an intensive literature review the intent and focus

was narrowed down and the previous research questions, stated in Chapter I, were established.

2. **Select the cases and determine data gathering and analysis techniques.** The Texas A&M University Career Center distance education initiative was chosen for several reasons. First, it is similar to the case study done by Rice on planning the LEAD initiative. In her suggestions for further research, Rice challenged another scholar to delve into the planning process for other initiatives within higher education. The researcher is purposely using the same continuum, development stages, and wording that Rice used in her dissertation so that the research can be easily compared. Second, there are University Career Center's nationwide that are facing the same problems as Texas A&M University and they could benefit from the experiences in this case study. Third, this is a real life situation where further study will expand the current body of knowledge in the field of HRD. This report will use the following outline that has been adapted from the outline used by Rice (2002):

1. Present the background of the distance education initiative.
2. Divide the planning process of the distance education initiative into specific stages.
3. Describe each stage by presenting the major decisions, events, challenges and strengths and weaknesses of the planning process.
4. Analyze the planning process used to develop the distance education initiative in light of a continuum based on the literature review.

5. Use the findings to create a conceptual guide, which can provide insight to planners designing and implementing similar initiatives.
3. **Prepare to collect data.** “Case study researchers will typically begin a study using only one method of data collection and will add others as the situation warrants it. The added benefit of this process is that it can enhance the validity of the case study findings through triangulation” (Dooley, 2002). Lincoln and Guba (1985) state that triangulation is a technique improving the likelihood that findings and interpretations will be deemed credible. Yin (1994) listed six data sources; archival records, documentation, direct observations, interviews, participant observation, and physical artifacts. The following is a description of the data sources that were used in this study.
1. The researcher made use of experiences gained as Director of Placement responsible for developing the distance education initiative. This is a subjective account based on events that were documented as they happened.
  2. The researcher made use of Franklin calendars, weekly meeting notes, monthly letters, and other written documentation in legal pads to insure the accuracy of events and timelines used in final report.
  3. The researcher examined all documentation on record used to develop the distance education initiative. These included, correspondence, published articles, training manuals, minutes from advisory council

meetings, and notes from class projects regarding the distance education initiative.

4. The researcher reviewed surveys conducted by the Texas A&M Career Center that are posted on their unprotected website.

This variety of documentation brought validity and a measure of objectivity to the case study. The researcher conducted all fieldwork, collected data and performed document analysis.

4. **Collect data in the field.** Dooley (2002) points out that data collection in case study research is emergent. During the first semester of classes Dr. Dooley suggested focusing on one topic from the researcher's current position as Director of Placement throughout her coursework. As Director of Placement at the Texas A&M Career Center the researcher was responsible for the technology initiative. The researcher immediately began archiving all calendars, meeting notes, correspondence, and other documentation pertaining to the technology initiative at the Texas A&M Career Center. It was apparent that documentation regarding the technology initiative was going to be an endless stream so the researcher decided to end the data-collecting stage in spring 2003. The researcher based this decision on practical and theoretical considerations supplied by Gall, Borg & Gall (1996) and Lincoln and Guba (1985). Gall, Borg & Gall (1996) states that time and budgetary constraints must be considered while Lincoln and Guba (1985) identified four criteria; exhaustion of sources, saturation of categories, emergence of regularities, and overextension, for deciding when to

stop data collection. The researcher was under time constraints and recognized that each of the four criteria supplied by Lincoln and Guba had been met (Dooley, 2002).

5. **Evaluate and analyze the data.** The researcher used an array of interpretations to determine relationships to the research questions. “Reflective analysis could be used in case studies to draw on other qualitative research traditions. Its use involves a decision by the researcher to rely on his or her own intuition and personal judgment to analyze data rather than on technical procedures” (Dooley, 2002).
6. **Prepare the report.** The researcher used reflective reporting with a conventional organization, introduction, literature review, methodology, data analysis and conclusions. The report is written in such a way that the reader should be able to apply this situation in their setting (Dooley, 2002).

### **Summary**

The methodology used for this case study follows the guidelines put forth and followed by other scholars in the field of HRD. The results of this case study contribute to the existing body of knowledge and are therefore a significant study.

## CHAPTER IV

### ANALYSIS OF DATA

#### Overview and Analysis of Stages of Development

The section will describe and analyze the strengths and weaknesses of the developmental stages of the Texas A&M Career Center technology initiative. The researcher will be using the same stages used by Rice so that it will be easier to compare and contrast the two research studies. As Director of Placement, the researcher has been responsible for every stage of the planning process. Journals, meeting notes, calendars, research notes and correspondence will be reviewed and used to tell the story of the Texas A&M Career Center technology initiative. The dates used for each stage are approximations based on calendars and activities during those timeframes.

The following stages of development used by Rice have been adapted to fit the Texas A&M Career Center:

1. Conception (June 2001 – December 2001)
2. Birth (January 2002 – June 2002)
3. Toddling (July 2002 – September 2002)
4. Up and Running (October 2002 – April 2003)
5. Adolescence (May 2003 – Present)

#### *Stage One: Conception*

The conception stage of this case study started in June 2001 when the researcher was interviewing for the Director of Placement position at Texas A&M Career Center. The researcher was new to the field and went online to get information from Texas

A&M, other universities, and outside agencies regarding Career Services. During this exploration the researcher realized that the Texas A&M Career Center did not have an online presence, their website was difficult to navigate and the information on the website was confusing and outdated. The researcher used this information during her interview presentation and suggested that there were opportunities for improvement in the use of technology. The suggestions for technological improvement along with ideas for marketing the Texas A&M Career Center were the main reasons the researcher was chosen to fill the Director of Placement position. Before the researcher was even hired the conception stage had begun.

The Executive Director of the Texas A&M Career Center wanted the Director of Placement to hit the ground running. Within the first week of the July 2<sup>nd</sup> start date the Executive Director assigned the Director of Placement responsibility for technology along with other duties. (Appendix B) The researcher is going to divide the conception stage into three sections and then discuss the strengths and weaknesses of the conception stage. The three sections are recognition, meetings, and proposal. During these sections the researcher will be writing in first person and there will be some reflection of personal opinion. As stated in methodology journals, calendars, meeting notes and other documents will be used to maintain a certain level of objectivity. This is a qualitative case study and is intended to provide insight into the planning process. The next sections will include the causes leading to recognition, information about meeting where I gained information and classes, meetings and research that led to creating the proposal.

*Recognition*

There were several causes that leading up to the recognition of the need for a technology initiative including the job market decline, student responses to Texas A&M Career Center surveys, employer input, and information presented at the 2001 NACE regional meeting in Keystone, Colorado.

As Director of Placement my knowledge of the job market was lacking so I began reading trade journals and articles to find out what the experts were saying. The same message appeared time after time – the job outlook for 2001 college graduates was bleak. “Job hunting has been like a game of musical chairs for this year's graduating seniors. Unlike last year, when students waited until they had several choices before picking the right employer, this year's layoffs and sour economy have students jumping at job offers, according to Patricia Rose, director of career services at the University of Pennsylvania. Some firms, particularly in the technology and consulting industries, are even rescinding job offers and canceling campus visits (Dashtinorkit, 2001).” Judy Mancuso, an Associate Director of Career Services, Carnegie Mellon University in Pittsburg had seventy-six companies cancel campus visits in spring 2001. At Texas A&M University the story was no different. Companies that in the past had hired 20-30 students were cutting back to 5-10 students. The consulting companies that had always been huge supporters of the Texas A&M Career Center were actually rescinding job offers. Then on September 11, 2001 tragedy struck and the job market was further depressed.

It is important to note that even prior to Sept. 11 our recessionary economy had resulted in the loss of thousands of jobs. Since the terrorist attacks, the job market has weakened further, driven by increased layoffs and nearly a million underemployed Americans. In the wake of the terrorist attacks the employment outlook for interns and college graduates in service sector professions, particularly in business and industry, is gloomy. In general, the war on terrorism and the downturn of the economy have caused some of the major corporations to curtail or cease recruitment on campuses. Thus, there will not be as many jobs available in the corporate sector for college graduates (Taylor-Archer, 2001).

The Texas A&M University Career Center knew that students were going to be facing stiff competition in the job market. It was imperative that we find a way to provide Texas A&M students the right training for the job search process. The Texas A&M Career Center was already using a variety of methods to reach students such as workshops, one-on-one advising, and teaching classes. Unfortunately, this was still not meeting the needs of the students and many were unprepared for the realities of the job search process.

According to Daniel Orozco, Assistant Director at Texas A&M Career Center, he usually received phone calls from two or three parents a year concerned because their child was having difficulties with the job search process. In the summer and fall of 2001 parents began calling and visiting the Texas A&M Career Center on a regular basis. It was not unusual to receive calls from two or three parents each week asking for information about the job search process and how their children could get assistance

from the Texas A&M Career Center. There were so many negative reports from the media that parents and students wanted any assistance they could find to gain an edge in the declining job market.

Every semester graduating students are given an opportunity to answer survey questions regarding the usefulness of the Texas A&M Career Center. The response rate on the survey increased from an average of 85% per year to 96% in the fall of 2001. Students were becoming more concerned and had more input they wanted to share. This input was used to call attention to the lack of student knowledge of the Texas A&M Career Center job search process training.

Employers were calling on a daily basis to cancel dates or lower the number of rooms reserved for job interviews. James Haverlind from Target generally hires between 20-30 Texas A&M graduates and he was cutting back to 2 or 3 graduates. In a discussion at his store, in September 2001, Haverlind expressed a disappointment in the quality of Texas A&M graduates. He said, "The students aren't prepared for the job search process and they think they are going to be hired just because they have an Aggie ring." Haverlind went on to say that the Texas A&M Career Center needed to provide better or more training in several key areas including, resume writing, interviewing, and leadership. One student allegedly showed up to an interview in blue jeans and a T-shirt with an inappropriate slogan, without a resume or notepad and was so arrogant that the Target recruiter refused to conduct the interview. This kind of student behavior is out of the ordinary but the story illustrated the point that the Texas A&M Career Center was not reaching all of their students with a job search training process.

Regina Turman, a Texas A&M University graduate and a recruiter, said that she used the Texas A&M Career Center for the interviewing process but did not use our job search process training. She went on to say that she knew we had workshops but never attended them because, as a business major, her classes were on West campus and our classes were taught on East campus and it was too difficult to find parking and time. Turman also laughingly said, “You would be surprised if you could see or hear some of the graduates I interview. They have no idea what is going on and give responses that you would not expect from a high school graduate.” This was just one more indication that something needed to be done to remodel our job search process training.

In July 2001 the Texas A&M Career Center professional staff attended a regional meeting of NACE in Keystone, Colorado. This conference was designed to give employers and university staff members an opportunity to be together and discuss issues regarding recruiting and the job search process. (Appendix C) The Texas A&M Career Center professional staff was instructed to split into teams and make sure that we covered attendance at every session. During off hours and meals we arranged to meet with key employers to get as much information as possible regarding recruiting at Texas A&M University. In addition to meeting with employers I was given the opportunity to meet professional staff members from other key universities and exchange ideas about how to react to the declining job market and getting students involved in training for the job search process. Technology was an area that was discussed but very few people had any experience or real knowledge about how to use technology to improve their job search process training.

The University of Texas at Austin Engineering Career Services taught a workshop entitled *eCareer Services: Innovative Ways to Integrate the Web in Career Services*. The focus of this workshop centered on having a web site linked from the home page of your university. There was also a lot of discussion about the kind of information that should be included on your web site. The conclusions drawn were good contact information for faculty and staff as well as copies of printed materials on job search process. The final part of the workshop unveiled the new online registration and interview sign up process adopted by The University of Texas. This was all good information as a review but Texas A&M Career Center was already using the web in the same or perhaps better way. Texas A&M Career Center was using and continuing to develop a database system designed to meet the needs of students and employers setting up interviews.

Luke Wyckoff, from Development Dimensions International, presented a workshop on E-Learning that provided newer more innovative ideas. Wyckoff was not a career services expert and the best new ideas actually came from listening to the audience. As a young dynamic speaker Wyckoff encouraged the audience to brainstorm and create the perfect world in career services. The emphasis was on how leadership must guide the process in order for the staff to build the dream. During this session I was able to make contacts with other career service professionals interested in using technology to improve job search process training. These contacts were the people I talked to and bounced ideas off of throughout the next few years as the Texas A&M Career Center worked to improve our program.

The declining job market, student responses to survey, employer comments and the NACE meeting all contributed to the recognition that Texas A&M Career Center needed to make changes. The job search process training we were providing was either not working or not reaching students. The recognition phase was ongoing throughout the conception stage because I continued to gain updated information from sources at various meetings.

### *Meetings*

As the Director of Placement at Texas A&M Career Center I was required to attend a multitude of meetings. These meetings included, management team, student advisory council, employer advisory council, professional staff, placement team, recruiter, national and regional career services organization, department head, other universities, technology and a one on one with the Executive Director. During the conception stage I was constantly gathering bits of information regarding the use of technology from sources at each of these meetings.

The management team meets every other week and consisted of the Executive Director, two Director and two Associate Directors. The purpose of this meeting was to make sure that everyone was on track and to lend assistance to each other when needed. Many times this meeting turned into a session where the Executive Director would unload responsibilities passed down from other departments at Texas A&M University or outside organizations. Most members of the management team were not technology savvy but as a team were supportive of increasing our use of technology. The Director of Experiential Education was in the Texas A&M University Educational Administrative

program and had heard of distance learning but had not participated in any classes. The key information taken from these meetings was that the management team would support and wanted some kind of technology initiative but they did not have the knowledge to even know where to start. It was decided that as Director of Placement I would be responsible for spearheading all activities regarding a technology initiative.

The student advisory council met two or three times each semester and they were much more technology savvy. In October we spent the greatest portion of a two-hour meeting brainstorming ideas for using technology. The following is the list of top ten ideas that the student advisory council suggested for using technology to improve job search process training. These are not listed in any particular order.

1. Require all students to register through database and complete job search process quiz before interviewing on campus.
2. Provide links to students on web page to good job search process training sites.
3. Have remote sites broadcast workshops so students do not have to come to Rudder Tower or the Koldus Building.
4. Use the computer labs in a variety of buildings to actually register students during the workshop on the Texas A&M Career Center AggieLaunch system.
5. Stop charging a fee for using AggieLaunch system so that students will register and use services.
6. Use the Internet.

7. Videotape recruiters talking about what they like to see.
8. Videotape student interview and play them back for critique by a professional staff member.
9. Provide students with email links to employers hiring Aggies.
10. Provide students with links to company information so they can be more prepared for interviews.

This list of top ten ideas from advisory council was useful for a couple of reasons. It showed us that even our own advisory council students did not know about all of our services because we already offered links for job search training sites and company information. The other ideas were ones that we needed to explore and consider when deciding how to use technology.

The employer advisory council meets each summer and updates employers on new programs, reviews Texas A&M Career Center and national recruiting numbers, and solicits feedback and suggestions from employers. During the conception phase there was no interaction with the employer advisory council.

The Texas A&M Career Center professional staff meets every other week to review accomplishments, new career services information, opportunities and potential problems. The professional staff vocalized in almost every meeting the need to make changes to the web site or some other technological idea to improve job search process training. The following is a list of key ideas for technology that were found in notes taken at the professional staff meetings during the conception phase.

1. Add a parent section to the web site.

2. Videotape employers teaching job search process workshops.
3. Videotape employers interviewing students.
4. Videotape mock interviews.
5. Create interactive online workshops.

Some of the ideas, like the parent section, generated by the professional staff were ideas that were simply implemented with no real planning. The other ideas were added to the growing list of ideas and possibilities for a technology initiative.

The placement team meets every week and consists of Natalie Smith, Assistant Director of Employer Relations; Daniel Orozco, Assistant Director of Student Relations; Paul Pausky, Assistant Director – Former Students and the Director of Placement. These meetings were informal problem solving brainstorming sessions. At the end of each meeting we would review next steps and assign duties. Pausky is a true out of the box thinker and often came up with unrealistic ideas that upon discussion led to great ideas that could be implemented. The following is a list of ideas for using technology developed in the placement team meetings not included in other lists.

1. Create interactive quizzes.
2. Require students to pass interactive quizzes before interviewing on campus.
3. Have an interactive taped interview process that could be critiqued by a Career Services Coordinator.
4. Sell online advertising space to employers.

In the fall 2001 semester there were daily meetings with recruiters. Each morning, throughout the day and in the evening I would speak with recruiters regarding the job market, their company and ask if they had suggestions for making the job search process easier. Most recruiters praised the Texas A&M Career Center AggieLaunch system as the best in their territory. One thing that several recruiters asked about was a way to reach more students with information about their company. This was one more thing I added to the list of ideas for using technology to inform students about the companies interviewing at Texas A&M Career Center.

Technology was a topic under constant discussion within NACE and SWACE during the entire time the Texas A&M Career Center was planning the technology initiative. One idea that came from these organizations was an interactive online phone workshop. Throughout fall 2001 there were at least three workshops in which the Texas A&M Career Center participated. The information presented was good but the format of the workshops was boring and ineffective. It would have more effective if the information had simply been sent out in a newsletter.

The workshop was presented with a voice coming through your phone speaker while you viewed a power point slide show on your computer. Many times the slide show and the voice would be out of sync and the slide show really did not add any value to the workshop. The idea was at the end of the workshop participants could ask questions. This was also confusing as participants would speak at the same time or when the participant asked a question only the presenter could hear. Overall the experience was frustrating because the workshops really were not interactive. There was some value

obtained from participating in workshops because we recognized that it was unnecessary to use technology when a flyer would be just as good. We also came away from workshops with the knowledge that it is imperative that you understand how to use technology before trying to present to large groups.

Another idea for using technology to present to large groups came from one of the universities in Tennessee. A motivational speaker specializing in the job search process was hired to speak in Tennessee. The university decided that to pay his fee they would offer to broadcast his presentation live and give students at participating universities an opportunity to call in with live questions. Texas A&M Career Center's Executive Director thought this was an excellent idea and instructed me to set it up for our students. The presentation was excellent but the phone in portion was a disaster. There were constant busy signals and only a few students from outside of Tennessee were able to get through with questions. Another problem at Texas A&M University was lack of student participation; there were less than 10 students in attendance. We ordered a copy of the video yet very few students actually took the time to come to our office to watch the video.

Weekly meeting with the technology team was where I gained some of the most valuable information. The technology team consisted of the Assistant Director of Technology, an outside vendor, and the Director of Placement. Most weeks we would ask one or two other key members of the professional staff to attend our meeting to get their input. It was during these meetings that I learned about our current technological situation, the tentative future plans for upgrades, AggieLaunch and any other questions I

had about technology were answered. There were many times when our meetings would turn into hands on sessions while the technology experts tried to show me how something actually worked. In fact I even climbed up in the crawl space and ran new lines for a computer that was not working. The point of this is that I wanted to understand as much as possible about our setup so that I could make intelligent decisions and not just accept everything the technology team suggested. Early on I discovered that the technology experts always thought bigger, newer and faster was better even when there was nothing wrong with what was already in use.

In addition to my other meetings, I met every week with the Executive Director to update her on the progress of each team under my responsibility. During these meetings the Executive Director would set priorities and make suggestions based on what I reported. The Executive Director was very supportive of technology and often sat in on the technology team meetings. She did not have any real knowledge of technology and often would confuse issues or simply agree with the outside vendor, Joseph Smith, who she trusted because he developed AggieLaunch. Smith was extremely knowledgeable and he gave me a lot of direction when I was doing research or was trying to understand some kind of technology. The Executive Director was very anxious to see the Texas A&M Career Center start using technology in innovative ways and was willing to entertain and support all ideas. Video streaming was one type of technology that the Executive Director had heard of and she was pushing very hard to begin the process of video streaming before we were ready. Smith and I assured The Executive Director that we would investigate the opportunities for video streaming and I would report our

findings. Problems sometimes arose because during the conception stage the Executive Director wanted to start implementing technology with no clear plan.

In the fall of 2001 I enrolled in a Distance Learning class, EHRD 671, with Dr. Larry Dooley. This class opened my eyes to a whole new world of distance learning that I had never even considered for the Texas A&M Career Center. My mind had been more focused on updating our current AggieLaunch system. Distance Learning was the real answer to improving job search process training at the Texas A&M Career Center. The books we used in EHRD 671 were perfect because one included a variety of case studies that I could use as models and the other provided information on actually designing a distance learning program. These were going to be invaluable resources during the birth stage of planning.

### *Proposal*

Before really starting the formal written plan I felt we needed a clear proposal that would provide some kind of direction. This proposal would simply outline the scope and key goals of the Texas A&M Career Center technology initiative. Once the goals were in place it would be easier to do the research necessary to develop a strategic plan for a technology initiative.

### *Strengths of Conception Stage*

The following is a list of the perceived strengths of the conception stage.

1. The Executive Director and the management team were ready for a technology initiative and willing to financially support a plan.

2. As Director of Placement I was new to the industry and had no preconceived ideas or prejudices that would keep me from exploring all possibilities.
3. Input from all stakeholders was sought and recorded. Seeking input from stakeholders created excitement and provided buy-in at all levels.
4. I insisted on creating a strong strategic plan before rushing to implement fragments of ideas. This caused some friction before the actual proposal and plan was created.

#### *Weaknesses of Conception Stage*

The following is a list of the perceived weaknesses of the conception stage.

1. As Director of Placement I was new to industry and the conception stage dragged on longer because I had so much to learn.
2. The Executive Director wanted to implement ideas immediately without a cohesive strategic plan.
3. There was so much input from a variety of sources that there were times when we faced conflicting ideas.
4. At times it was unclear who was taking the leadership role in the technology initiative. My background in industry made me accustomed to making decisions without having to go through a committee.

### *Stage Two: Birth*

Like a woman in labor the birth stage was the most painful stage we encountered in the strategic planning process. We had the proposal but it was nothing more than a broad outline of the scope of the project. The most important part of the proposal was not what was included but what was excluded. We knew we did not have to deal with the AggieLaunch system. This was good because when AggieLaunch was involved the required group of people involved would be unmanageable. The birth stage consisted of building a team, intensive research, benchmarking, and creating a strategic plan. The birth stage was when we needed to build a strong foundation for the technology initiative. Without a strong foundation the strategic plan would be useless.

#### *Technology Initiative Team*

During this stage I gathered a small team of advisors to work with me to create an actual strategic plan. My team consisted of Smith, Allen Little the Assistant Director of Technology, and Tyson Moore an Industrial Distribution student with advanced computer skills. Smith and Little were responsible for keeping our AggieLaunch system running at all times so they worked with me on specific tasks. They were part of the team solely for their input on technology.

Moore was hired to work on the technology initiative and was invaluable during the birth stage because he knew what technology was efficient and available. Communication was crucial during the strategic planning process so, Moore and I met on a daily basis during the birth stage to ensure that we were not duplicating tasks and stayed on track. Many members of the professional staff knew Moore could repair

computers and they would pull him into their offices when they had problems. Moore was a student worker and did not feel comfortable telling Assistant Directors that he could not help them because he was on the Internet. Online research was a large part of Moore's job so when professional staff members saw him online they usually thought he was just surfing the web. In late February during a professional staff meeting I requested that any work for Moore come through my office. This virtually eliminated the problem with the professional staff members pulling Moore away from his responsibilities. Looking back I realize I created quite a bit of animosity toward our technology initiative during that meeting because I did not explain why I was making the request or why Moore was spending so much time online.

#### *Research & Benchmarking for Technology Initiative*

The first item on the research list was video streaming. Smith and Little were assigned this task and after a few weeks of research, reading multiple articles, and viewing a variety of video streams on different types of Internet connections they gave a report on January 24. The end result was that while the technology needed for video stream was readily available most of our target audience did not have the right kind of connection to utilize the technology. Students using a phone modem could see the video stream but the people appeared to be moving like robots and it was very slow.

I immediately brought this information to the Executive Director during our weekly meeting directly following the technology meeting. The Executive Director had expressed an interest in video streaming and appeared disappointed but did not enter into much discussion. This caused some frustration on her part later in the birth stage because

she apparently misunderstood and thought we were still working on video streaming. Luckily, I was able to show her our previous meeting notes and she remembered “some conversation” but was disappointed and seemed to believe that the decision not to pursue video streaming meant there was no longer a technology initiative. Smith was called in to the meeting and after some discussion regarding other types of online technology the Executive Director was satisfied.

Moore spent all of his time in the first three months of the birth stage doing research on technology available. He was charged with examining every possibility using the technology we already had in house and other online opportunities. Moore worked closely with Little and they identified several possibilities including a program we already had in house that had chat rooms.

Benchmarking is a technique in constant use in industry so I instructed Moore to scour the web sites of other colleges and universities to see if they anyone was conducting job search training online. This was probably the most time consuming task because there were so many web sites to check and many sites were password protected. Early in the process Moore was coming to my office each time he hit a password roadblock to find out if I could help and we were wasting valuable time. We realized that we should narrow our search and came up with the idea of contacting some of the people I had met at the RMACE meeting.

I called the Director at Louisiana State University and she was extremely helpful and gave me a list of universities, phone numbers, and names of Directors she knew would be willing to share information. After talking to Directors from key universities in

Texas and throughout the United States we chose University of California Los Angeles and Florida State University. These two universities had the most advanced technology and the best online presence. Both of the sites were password protected and Moore could not get authorization to enter the sites. We approached the Texas A&M Career Center Executive Director and she was a member of a secret organization, Guns & Bottles, with the Directors from UCLA and FSU. The Directors at both universities gave us permission to view their sites and offered their assistance.

Moore viewed both sites and made notes about the strengths and weaknesses of both sites. After reviewing the information as a team we decided the key strength was job search process training was available online. The weakness was that the presentations were nothing more than power point slides with a person reading the slides. This was not what we were looking for so we decided that we would set the mark for other universities.

### *Writing Strategic Plan*

When I wrote this strategic plan I used pieces of a variety of models. I started with the Basic Model that is generally used by very busy small organizations led by top management. I used different verbiage than the original basic plan and have italicized words that I changed. The following is a list of steps involved in the Basic Model:

1. Identify your purpose (mission statement)
2. Select the *objectives* your organization must reach if it is to accomplish your mission

3. Identify specific strategies that must be implemented to reach each *objective*
4. Identify *tactics* to implement each strategy
5. Monitor and update plan

Other models were then incorporated into the different steps of the Basic Model. There are three questions from the Drucker Model that I used to gather information.

1. What is our mission?
2. Who is our customer?
3. What does the customer value?

During my tenure as a sales representative at Black & Decker I lived and breathed MBO's and TQM. When setting objectives I used the "SMART" method used in MBO's. This means that every objective must be Specific, Measurable, Attainable, Relevant, and Timely. Freedom to pursue objectives in whatever manner you deem best is also an important part of MBO's. The TQM process simply stresses constant improvement and encourages input from anyone at any level. The Cafferella Model illustrates that planners can work on a variety of tasks simultaneously. The Harvard Policy Model and Ansoff Model were both used to gather information about the internal and external environment. Ansoff stresses the importance of being aware of synergies and the effect of interrelationships between parts. In this strategic planning process I also had to look at Bourgeois and Brodwin because I was dealing with outside personnel who had to be managed carefully. I will explain this more fully as I go through and recount the strategic planning process for the technology initiative.

My primary responsibility was to actually write a strategic plan for the technology initiative. Strategic planning was not new to me and I had written dozens of plans while working outside of academia. My experience turned out to be a double-edged sword. On one side I understood strategic planning and could cut through the vast amounts of information generated from the research. On the academic side it felt like I was using a butter knife to saw through steel. I met with resistance every step of the way. This is where the birthing pains were the worst.

In order to avoid potential resistance from the Executive Director or Management team we had a meeting in mid-March devoted entirely to identifying our mission. Each person had a copy of the proposal so that we did not get bogged down in reinventing boundaries. Unfortunately, I discovered that in the Texas A&M Career Center there were a few Associate Directors who wanted to revisit every decision and discuss the history and who was responsible for making the decision. After an entire hour of discussion revolving around the proposal and the fact that AggieLaunch was not going to be part of the technology initiative the management team was in agreement but the Executive Director had to leave for another meeting. We were forced to push back the mission planning to the next available date and between Spring Break vacations and other commitments the next date we could meet was April 30<sup>th</sup>. This was frustrating because we were wasting so much time on one part of the plan. I decided that after this meeting I would not ask for input from the management team as a whole. Each member of the management team could be clear and concise in one on one meetings but as a group fear set in and each person tried to outdo the other by coming up with unrealistic

scenarios. Before the April 30<sup>th</sup> meeting I had several informal meetings with each member of the management team and asked the three questions I wanted answered in the meeting.

Defining our target market by identifying our customer was not as easy as expected. Associate Directors listed faculty, employers, undergraduate students, Texas A&M University staff members, and parents. The Director of Experiential Education was not quite as broad and listed undergraduate students, and faculty. The Executive Director added graduate students and former students to the list of potential customers. I hand carried the list of potential customers and another copy of the proposal to each member and explained my position that our primary market was undergraduate, graduate, and former students. This is the audience that needed to go through the job search process training to modify and improve behavior. The other groups were stakeholders but were not the primary customer we were trying to reach.

The next step was to identify what the customer valued. It was much easier to get agreement from the management team on this question because we constantly seek and share input from students about what they need and want. I pulled the information from our online student recruiting values and compiled a list of requests and complaints. Many of our nonprofessional staff members work closely with our students so I asked for input from all Texas A&M Career Center staff members. The front counter staff interacts with our students on a daily basis and they provided valuable input to this process. During a semester end meeting we had worked on a SWOT analysis that had listed several student needs and wants. Information from all of these sources was

discussed during informal meetings whenever I could catch a management team member before our next meeting.

On April 30<sup>th</sup> the management team met again to define our mission. We had already had so many informal discussions that this meeting proceeded without problems. The mission statement was not as concise as I would have liked but I agreed because it outlined exactly what we had agreed upon in the last month during our informal meetings. We were going to educate all current and former Texas A&M University students on the job search process.

Now I was ready to set objectives. I was concerned about working with the management team on setting objectives because I knew we had different philosophies. During a meeting in the fall of 2001 I was assisting with setting objectives for the Texas A&M Career Center and when I tried to use “SMART” as a guideline the entire management team reacted with disbelief. The Associate Director started laughing while the Director of Experiential Education promptly informed me that I was not in industry anymore. The Director of Experiential Education went on to say, “This is academia and we don’t set objectives that are measurable.” The Executive Director and the rest of the management team was laughing and nodding their heads. At first I went home shaking my head in disgust and then I thought, “Wow, what a great job. We are setting objectives that really can’t be measured. All we have to do is say yes we met our objectives!” Remembering this objective setting fiasco I decided to take charge and set objectives, strategies, and tactics on my own. Looking back I realize this decision was the first of many mistakes that I would make trying to save time and personal frustration.

During the month of May very little time was available to devote to the technology initiative. The Executive Director was busy preparing for a summer full of local and national meetings where she would present our interviewing and recruiting numbers. Graduation and number crunching for a variety of meetings became the top priority. Career Service Coordinators had also decided they needed a new more professional looking brochure to use in company visits over the summer. My background in marketing and the fact that I was the only one in the office who knew how to use Adobe Photoshop and PageMaker landed me the responsibility of creating a brochure. This project kept me working long hours until early June.

One area of concern for the technology initiative was budgeting. During my weekly meetings in May with the Executive Director I asked for some type of guidelines for spending. The Executive Director who had been working in her position for almost ten years controls the Texas A&M Career Center budget. She has never exceeded her budget and keeps a running total of dollars spent along with over \$ 150,000 in a reserve account that is carried over each year. When inquiring about the budget the Executive Director would not give me any numbers but simply said she would find the money and not to worry. This was good in some ways because I did not have to be responsible for finding funding. The downside was I had no idea if she was thinking about an initiative that cost \$10,000 or one that cost \$100,000. This allowed me to proceed with planning and give the Executive Director estimated costs before implementing the plan. If she decided we had spent too much then we could find areas to cut costs.

In early June I spent an entire day in my office with the door closed and my phone turned off so that I could write objectives, and strategies. There was no discussion or input from anyone. Working alone made it easier to develop a strategic plan because I was not hampered by suggestions or disagreements (Figure 6). All objectives were “SMART” and strategies are nothing more than a broad based plan of action.

### *Strengths of the Birth Stage*

The following is a list of the perceived strengths of the birth stage.

1. The Executive Director of the Texas A&M Career Center supported the idea of a technology initiative and provided input and assistance throughout the strategic planning process.
2. The Executive Director instructed me to come with a plan and let her worry about the budget so I did not have to spend time finding ways to finance the technology initiative.
3. The Executive Director’s high visibility, respect from peers in industry, and participation in industry related organizations provided invaluable contacts and resources that otherwise would not have been available.
4. Hiring Moore and creating a technology team gave me the ability to utilize more resources and conduct deeper research.
5. Smith’s involvement in this stage gave us access to technological expertise and experience.

**Figure 6. Texas A&M Career Center Technology Initiative 2002****Texas A&M Career Center Technology Initiative 2002**

**PHASE ONE:** The first stage of this initiative will focus on current undergraduate and graduate students. The second phase will be designed to reach former students who need more advanced interviewing skills. The same type of job search process training CD will be created utilizing employers and human resource specialists accustomed to interviewing experienced hires.

**Objective 1:**

1. Provide job search process training for 100% of Texas A&M University undergraduate and graduate students by Fall 2003.

**Strategies for Objective 1:**

1. Build partnerships with Colleges and Departments across campus to assist in distribution of job search process training CD.
2. Create awareness and increase credibility of Texas A&M Career Center job search process training.

**Objective 2:**

2. Use technology to create a job search process training program on CD that focuses on the three foundational areas of the job search process, getting prepared for the job search, resumes, and interviewing by the Fall of 2003.

**Strategies for Objective 2:**

1. Utilize existing relationships with employers to encourage participation in the job search process training.
2. Encourage faculty participation from each department in the job search process training.
3. Create consistent workshops centered on the foundational areas using dynamic speakers and presentations.

6. Input from such a wide variety of sources, including stakeholders, generated ideas that helped create a framework.
7. We resisted the impulse to start implementing pieces of technology without having a plan or conducting research to ensure that what we were implementing was what we needed.
8. Our first major breakthrough came in a meeting with The Center for Distance Learning personnel. They presented the brilliant idea of using a CD rather than trying to use the Internet. This was a real paradigm change because we had been so committed to the idea that new technology had to include the Internet.

#### *Weaknesses of the Birth Stage*

The following is a list of the perceived weaknesses of the birth stage.

1. I got frustrated working with people who wanted to revisit every decision and ask questions that I felt were not important. As a result I became secretive and stopped sharing information. This caused problems for the rest of the strategic planning process that could have been avoided if I had simply been more forthcoming with information and updates. This was probably the biggest mistake made during the strategic planning process.
2. There were so many other job responsibilities and priority changes that I often put the technology initiative on a back burner to put out a fire. The strategic planning process was dragging on so long with no

updates that people thought we had decided not to move forward with a technology initiative.

3. We had several ideas, such as video streaming, that were not feasible solutions and this caused frustration and the feeling that we might never find a way to use technology to improve job search process training. It was difficult for this to be happening during the birth stage because we felt like we might never even be able to create a plan.

### *Stage 3: Toddling*

During the toddling stage the most important task was to create tactics for each strategy. Tactics are specific plans of action that should include a deadline as well as the name of the person responsible for completing the task. Once again I decided to be the Commander and use as many of my direct reports as possible so that I could maintain control of the planning process. There were also several professional staff members that did not report to me but were extremely knowledgeable and willing to give input without asking a lot of questions or rehashing every initiative undertaken by the Texas A&M Career Center. I began inviting the Career Services Coordinators to every other weekly meeting of the Placement team. During these meetings we always discussed feedback from employers and students and brainstormed about ways to improve the job search process training. I also had informal meetings with three key professional staff members from the Experiential Education department to get their input. There was never any formal announcement that this input was being used to develop the technology initiative.

The input I needed was actual information that should be included in the job search process. We agreed that the three foundational areas from the birthing stage were on target. I took notes during these meetings and paid careful attention in professional staff meetings to ensure that when it came time for actually creating tactics and assigning responsibility I knew who could be trusted and would want to be involved. I began creating tactics to go along with the strategies early in the toddling stage (Figure 7). I knew that my preference was to be given a task and then left alone to decide the best way to complete that task so I decided to give my staff the same freedom.

### **Figure 7. Tactics for Texas A&M Career Center Technology Initiative**

#### **Strategy:**

Build partnerships with colleges and departments across campus to assist in distribution of job search process training CD.

#### **Tactics:**

<b>ACTION</b>	<b>TIMING</b>	<b>RESPONSIBILITY</b>
Meet with every Dean and Department Head	July 02-August 03	Placement Director/Executive Director/CSC's
Schedule classroom presence	Fall 02- Fall 03	CSC's/Professional Staff
Provide substitute when faculty is out	Fall 02 – Fall 03	CSC's/Professional Staff
Attend student orientations	July 02- August 03	Orozco/Professional Staff
Continue with faculty training and relationship building	July 02 – Ongoing	Matt Upton

**Figure 7. (Continued)****Strategy:**

Create awareness and increase credibility of Texas A&M Career Center job search process training.

<b>ACTION</b>	<b>TIMING</b>	<b>RESPONSIBILITY</b>
Attend all Career Fairs	Ongoing	Orozco/Professional Staff
Purchase golf cart	August 02	Orozco/Executive Director
Schedule weekly student activities in a variety of sites on campus	Ongoing	Orozco/CSC's
Volunteer for advisor positions with key student organizations	Ongoing	Executive Director/Professional Staff
Create plan for new student activities	Fall 02	Orozco/CSC'S
Invite employers to attend student activities with Career Center staff	Fall 02 – Ongoing	Natalie Smith/Professional Staff
Review all information currently used in job search process training	July 02 – August 02	Placement Director
Create publicity team and plan	October 02 – Spring 03	Career Services Coordinators/Upton/ Placement Director
Distribute CD	Fall 03	Placement Director/Professional Staff

Figure 7. (Continued)

**Strategy:**

Utilize existing relationships with employers to encourage participation in the job search training.

ACTION	TIMING	RESPONSIBILITY
Recruit employer volunteers through email	August 02	N. Smith
Meet with employers at their site	Summer 02/03	Brett Hobby/CSC's
Schedule video workshops	Fall 02 – Spring 03	N. Smith/Hobby
Determine if additional funding is available from employers	Fall 02 – Spring 03	Wayne Terrel

**Strategy:**

Encourage faculty participation from each department in the job search process training.

ACTION	TIMING	RESPONSIBILITY
Solicit the most popular faculty members to teach workshops on CD	August 02 – April 03	CSC's/Upton

**Figure 7. (Continued)****Strategy:**

Create consistent workshops, using technology, centered on the foundational areas using dynamic speakers and presentations.

<b>ACTION</b>	<b>TIMING</b>	<b>RESPONSIBILITY</b>
Use updated job search process materials to create an outline for the CD workshops	August 02	Placement Director
Provide outlines and specific instructions to employers and faculty participating in workshops	September 02	N. Smith/Hobby
Review all completed workshops	May 03	N. Smith/Hobby
Utilize student workers in videos	Fall 03 – Spring 03	Orozco/N. Smith
Create interactive exercises using foundational areas	Fall 02 – Spring 03	Placement Director/Moore
Compile workshops and actual CD to be distributed	Spring 03	Placement Director/Technology Team
Test and update the job search process training CD with student focus groups	Spring 03 - Summer 03	Placement Director
Create job search process training CD	Summer 03	Placement Director/Batts Audio Video

The first person listed under the responsibility column was the driver and they were required to create a plan or list of tactics for meeting their timing deadlines. When working with this strategic plan using objectives, strategies and tactics it was imperative to constantly evaluate, update and make changes as needed. The written strategic plan I created was a guide and a reminder of what needed to be done to launch our technology initiative in the fall of 2003. For this reason I chose not to distribute or present the plan but to simply assign tasks and track the progress on my own. This led to some anxiety on my part because I was moving forward with decisions that I was not always sure would be popular with the management team. I tried to alleviate some of this concern by mentioning different parts of the technology initiative strategic plan in meetings with the Executive Director without emphasizing how far along we were.

#### *Strengths of the Toddling Stage*

The following is a list of perceived strengths of the toddling stage.

1. We were able to move quickly through the toddling stage of strategic plan because I was working alone.
2. Input provided from key professional staff members was excellent.
3. By the end of the stage we had a real strategic plan including timelines that could be evaluated and updated during the up and running stage.
4. The Executive Director did not slow us down and was still supportive of the ideas mentioned in our weekly meetings.

### *Weaknesses of the Toddling Stage*

It is only in retrospective consideration that I can recognize the weaknesses created by my approach to the strategic planning process.

1. My Commander approach was beginning to take its toll on the professional staff and creating frustration because they were unsure of what was happening. The secretiveness was starting to become problematic because I was moving forward with plans that had not been approved and could be scrapped at a moments notice if the Executive Director was not pleased.
2. The system of evaluating and tracking the plan was unstructured.
3. The Executive Director continued to assign top priority projects that took time away from the technology initiative.

### *Stage 4: Up and Running*

It was during the up and running stage, October 2002 – April 2003, that in some areas we were able to make great strides and in others the plan began to unravel. The areas where we made great strides were the development of workshops, videotaping of employers, creation of interactive workshops and the creation and launch of a new publicity plan designed to increase awareness of the Texas A&M Career Center. In the fall of 2002 rumblings began throughout the university about state mandated budget cuts. These budget cuts along with the veil of secrecy led to the unraveling and eventual postponement of actually creating the job search process CD.

The development of workshops was achieved by reviewing materials currently available at the Texas A&M Career Center. The information needed for the job search training process was already available and was kept in notebooks, files and in printed brochures. During my informal meetings with professional staff members I began asking what workshops worked best. In our bi-weekly professional staff meetings each team reported successes from their workshops. I attended a variety of workshops to discover first hand which professional staff members were actually reaching the students. I used our printed brochures that had been updated on a regular basis by our Career Services Coordinators as an outline for workshops.

N. Smith had to take maternity leave so Hobby took a leadership role in taping recruiters for the CD. In an effort to save time and money the recruiters were taped while they were in College Station interviewing students. This caused some problems because the recruiters had full schedules and were sometimes rushed during their taping. The recruiters were not as prepared as anticipated and it took more time than expected because Hobby would have to prepare the recruiters before he could begin taping. The outcome was not as professional as expected but it actually lent a feeling of reality and customization to the information. Students who viewed the tapes could see that these recruiters had not done a slick production that was going to students at every school. There was a stronger feeling of credibility because the recruiters were taped at the Texas A&M Career Center and were speaking directly to Texas A&M students.

Moore and I worked together on creating an interactive workshop for resume writing. In brief, the workshop had step-by-step instructions where students were asked

to print a series of resumes. The next step had students listening to the jeopardy final answer ticking clock music while they were told to choose the best resume based on the criteria set forth on the screen. The criterion was simply that the student must have a 3.0 grade point. The student then chose the resume through an onscreen quiz and the answer was that several of the resumes were correct. At that point an audio power point show began talking about each resume and discussing what was good and bad about each resume. At the end the students were given a list of Career Services Coordinators, by college, who could review their resume by email. The objectives of the workshop were:

1. Engage as many senses as possible.
2. Show students how quickly a recruiter reviews resumes.
3. Allow students to recognize that they could personalize a resume.
4. Present the most common resume errors.
5. Give students who were interested a format to follow.
6. Provide an opportunity to have their resume reviewed by a professional staff member.

The resume workshop was tested by several graduate students and then linked to our website for additional testing. The Texas A&M Career Center staff was asked during a professional staff meeting to review the workshop and respond with thoughts or suggestions. There were no responses from the staff and when asked on an individual basis the reply was that they did not have time to review the workshop but thought it was a great idea. The student response was that on campus it was good, but off campus too

slow. This was exactly what we had expected and was the reason we were planning to use a CD rather than an online format for future workshops.

The most exciting development during the up and running stage was the development of a publicity team. This team was charged with creating a plan to increase awareness and build the credibility of the Texas A&M Career Center. Two Career Services Coordinators attended a marketing workshop in Austin and returned ready to spearhead the efforts of the publicity team. There were a few problems in the early stages because the publicity team members did not want to step on my toes or disagree with my ideas because I was a Director and I had many years of experience in marketing. Upton, a fellow PhD student who I had known since he was an undergraduate was on the publicity team and he helped alleviate the situation by treating me as an equal member of the team. The others began to follow his lead when they realized that I was willing to listen and even admit that someone else had a better idea than mine.

The publicity team met on a weekly basis and did a wonderful job of making plans to meet our objectives. Every week after our meetings one member was assigned to send an email to the entire Texas A&M Career Center staff an update on our activities. It was important to keep the project on the forefront of everyone's mind and keep the level of excitement high. A new brand and a list of requirements for using the brand were created. The team volunteered to be the "brand police" and required that all publications get approval before being printed. We hired a new graphics design person, Andy Russell, on a temporary basis to assist with the publicity team project. Russell immediately fit in with the team and provided some much needed graphic design

expertise and willingness to pitch in and do any job the rest of the team did not have time to complete.

In spring 2003 the publicity team scheduled a launch meeting and invited the entire Texas A&M Career Center to attend. As the staff entered they were greeted with cheers and clapping from the publicity team. There were balloons and posters hidden with white paper covers to heighten the suspense and create excitement. I decided not to be part of the presentation because I did not want anyone to feel like this new publicity plan was a directive from the top. The team members each got up and presented a different part of the plan. To keep it interesting the team unveiled the new logo by tearing the white covers off the posters and then served cake with the brand on top and punch and encouraged everyone to take a good look at the brand. After cake the team presented more information then had a short ceremony where they thanked each staff member for their specific contributions to the Texas A&M Career Center and gave them a fabric briefcase with new business cards, personalized notepads, pens, and a polo shirt all bearing the new logo. The presentation ended with an amusing slide show that was narrated by one of the team members. The publicity launch was a huge success. The only complaint we got was that we had spelled a name wrong on a set of business cards for the librarian. This launch was the time of the most excitement ever displayed by our staff and the only time I saw the entire Texas A&M Career Center in agreement without complaints.

This high lasted for a short time because the rumblings of budget cuts for us began circulating through the office. One of my Assistant Directors had a staff member

who was in Stage Two of the counseling process. The employee actually improved her behavior and seemed to be a poster child for the new system created by human resources. Unfortunately the improved behavior was short lived and we were forced to terminate her employment effective immediately. This caused rumors and fear to spread like wildfire through the Texas A&M Career Center.

The management team began meeting behind closed doors and this only added to the fear and feelings of discontent. The Executive Director refused to address the staff and instructed the Directors to reassure their people that we were not cutting jobs and were simply looking for ways to tighten our belts. At the same time the Directors were being told to look at their staff and see if there were jobs that could be cut. The Executive Director also wanted to use this opportunity to get rid of an Associate Director who was a low performer. The Executive Director had wanted to get rid of this employee for over two years but was unwilling to take the necessary steps because the employee was a minor and the Executive Director did not like conflict. There was some discussion of moving the employee under my area of responsibility because I was the only person who was willing to go through the steps necessary to terminate poor performers. All of this affected the technology budget because the Texas A&M Career Center was suddenly being asked to return money to our division to meet budget cuts. The idea of spending money to convert our employer tapes and interactive workshops into a job search process training CD was out of the question. We were being told to watch every expense no matter how large or small. The money the Executive Director

was keeping on reserve was going to be eaten up by the budget cuts and we would still need to have a reduction in force.

In April 2003 amidst the turmoil of the budget problems and the realization that I was being used as a terminator and a personal assistant for the Executive Director I decided to resign from my position as Director of Placement. The Executive Director did not give me an opportunity to train or even give her an update on any of the projects I had in progress including the technology initiative. I volunteered on several occasions to come to the office and go through my files with the Executive Director or a professional staff member and was refused. At this point the technology initiative was ready to roll out but was lacking an advocate to drive the implementation or plans for postponement. This was the end of the up and running stage.

#### *Strengths of the Up and Running Stage*

The following is a list of perceived strengths of the up and running stage.

1. We reached the stage of actual implementation of the plan. We were still fine-tuning and planning but the development of workshops, recruiter taping, outside vendor input, and publicity plan were all in progress.
2. The Publicity team did an outstanding job of creating and launching the publicity needed to meet the technology objective of creating awareness and increasing credibility.

3. The entire Texas A&M Career Center was excited about the possibilities and information regarding technology presented by the publicity team.

#### *Weaknesses of the Up and Running Stage*

The following is a list of perceived weaknesses of the up and running stage.

1. State mandated budget cuts caused the Executive Director to return dollars earmarked for technology to her division. The funding needed for full-scale implementation of the technology initiative was no longer available.
2. There were no contingency plans built into the strategic plan that gave direction in case of funding deficiencies or other obstacles.

#### *Stage 5: Adolescence*

During what should have been the adolescent stage I was no longer employed by the Texas A&M Career Center and was unable to direct the technology initiative strategic plan. Based on observations and informal conversations with current Texas A&M Career Center staff members it appears that the strategic plan for the technology initiative is in limbo. There is still a desire, on the part of the management team, to use technology but because of budget cuts and staff reduction there has been little progress. It is too soon to say if the strategic plan for the technology the technology initiative will be reinstated when funding becomes available. It would also be premature to attempt to provide strengths, weaknesses or an approach for the adolescent stage.

### **Data Analysis of Planning Approach**

In the following sections each stage of the planning process of the technology initiative is examined in light of the Planning Approach Continuum create by Rice (2002). A review of each stage and the timing of each stage are listed below:

1. Conception (June 2001 – December 2001)
2. Birth (January 2002 – June 2002)
3. Toddling (July 2002 – September 2002)
4. Up and Running (October 2002 – April 2003)
5. Adolescence (May 2003 – Present)

#### *Planning Approach in the Conception Stage*

During the conception stage planning was focused on concept development for the technology initiative. The Executive Director took on the role of advocate and the technology initiative started out under the Political/Relational umbrella. The Executive Director was ready for change and encouraged the management team to join her as advocates for the technology initiative. It was important to the Executive Director that all categories of beneficiaries were included or at least allowed input during the stage of conception. The political nature of the Executive Director caused her to want buy-in across the board from all stakeholders. The Executive Director moved from advocate to entrepreneur and emphasized the importance of creativity. It was during the conception stage that the Executive Director inspired the Director of Placement to become the new leader of the technology initiative plan. The Director of Placement had a strong background in strategic planning and was determined to move into a strategic planning

mode. Creating boundaries and a framework were crucial so that the strategic planning process could be completed. This stage of planning happened without forethought and has only been recognized as a stage after reading Rice's dissertation (2002).

### *Planning Approach in the Birth Stage*

The birth stage started off as a time of gathering information from any source we could find. We started off with a Political/Relational approach and encouraged input and garnered support from as many stakeholders as possible. Creativity was an important component during the birth stage. We were trying to affect change and needed to use new ideas and creativity to make plans for change. The input received from the Center for Distance Learning opened the Director of Placement's eyes to a whole new realm of possibilities and spurred her into action. She became what Bourgeois and Brodwin call a Commander; she decided to create the optimum strategic plan and force it on the rest of the stakeholders. Her background in industry was not an advantage in this stage because she was so accustomed to making decisions and either selling people on the greatness of the idea or telling people what was going to happen. At this point the Director of Placement took a step to the left and began working under the Cognitive/Rational umbrella. The planner was acting as a designer. During the birth stage there were times when the Director of Placement did not even keep the technology team abreast of what was being planned. This allowed her to move forward more quickly and actually create a strategic plan with objectives and strategies.

### *Planning Approach in the Toddling Stage*

The Commander was out in full force during the toddling stage and was not sharing information with anyone except to assign tasks to individuals or groups. The Director of Placement was operating under the Cognitive/Rational umbrella using the strategic approach with a heavy emphasis on designing the plan and setting plans of action. The management of the plan was her responsibility and while some informational input was sought from stakeholders the Director of Placement did not allow design input. The only bit of Political/Relational approach used was entrepreneurial where the Director of Placement was the visionary leader who would inspire others to take action. One of the reasons the Director of Placement had been hired was because she was a creative leader who was able to sell the Career Center staff on the idea that she would make changes that would improve the Texas A&M Career Center. The Director of Placement believed that it did not matter if her plans were shared or not shared. Either choice would have no bearing on the outcome of the strategic plan. The Executive Director and the management team would arrive at the same or a similar strategic plan if they were included or excluded in the decision making process every step of the way. The only difference was that the Director of Placement was able to cut the time and frustration dramatically by simply moving forward without keeping the Executive Director or management team informed.

### *Planning Approach in the Up and Running Stage*

In this stage the approach was under the active emergent umbrella with the planner sometimes acting as the implementer. There was much more emphasis on

assigning tasks and letting the lead person take responsibility for outcomes. The Political/Relational approach was used with the publicity team taking the lead as advocates in negotiating buy in from Texas A&M Career Center staff. There was an entrepreneurial emphasis on creativity and the publicity team was encouraged to take leadership roles to inspire the rest of the Texas A&M Career Center staff. The weekly email updates acknowledged the political nature of planning and helped include stakeholders in the process. There were times during the up and running stage where there was operation under the Active/Emergent umbrella. Incremental steps were being taken and as was the case with recruiter tapings innovations occurred in small steps and the emerging quality fostered learning. The internal and external decisions made by employers, the publicity team, and outside vendors worked together to create a new shared consensus among management.

#### *Planning Approach in the Adolescent Stage*

It would be premature to attempt to define the planning approach used during the adolescent stage.

#### *Summary*

At the beginning of this study the prediction was that the majority of the technology initiative planning would take place under the Cognitive/Rational umbrella with an emphasis on strategic planning. The Texas A&M Career Center technology initiative planners operated under every umbrella in the Planning Approach Continuum (Rice, 2002). The leader responsible for the technology initiative had the most influence over

which approach was used. The actual creation of the written plan was built under the strategic section of the Cognitive/Rational umbrella.

### **Analysis of Planning Approach Using Rudimentary Models**

Rice (2002) provided two models, the cyclical model (Figure 8) and the linear model (Figure 9), to explain the planning process. The cyclical model indicates there is a circular motion where the planner moves from one planning approach to the next and keeps moving around until the initiative is completed. The cyclical model shows the Cognitive/Rational umbrella as the starting point.

The Texas A&M Career Center technology initiative would be more accurately portrayed as starting under the Political/Relational umbrella. Throughout the conception stage the primary focus was on listening to input from all stakeholders. Rice's cyclical model (2002) has the movement going to the right from prescriptive to more descriptive and then looping back around to prescriptive. There are no arrows that allow for movement back and forth under the umbrellas. This is a weakness in the model when trying to fit the Texas A&M Career Center technology initiative to the cyclical model.

The linear model is a better fit for the Texas A&M Career Center technology initiative. The model shows that as an initiative moves through the stages of development there is one planning approach that is dominate with the other two planning approaches are also being used to support the primary planning approach. Data input can occur at any stage of development and it is an ongoing process. In the linear model concepts begin to occur during the second phase of moving through the

Figure 8. Rice 2002 Cyclical Planning Approach Model

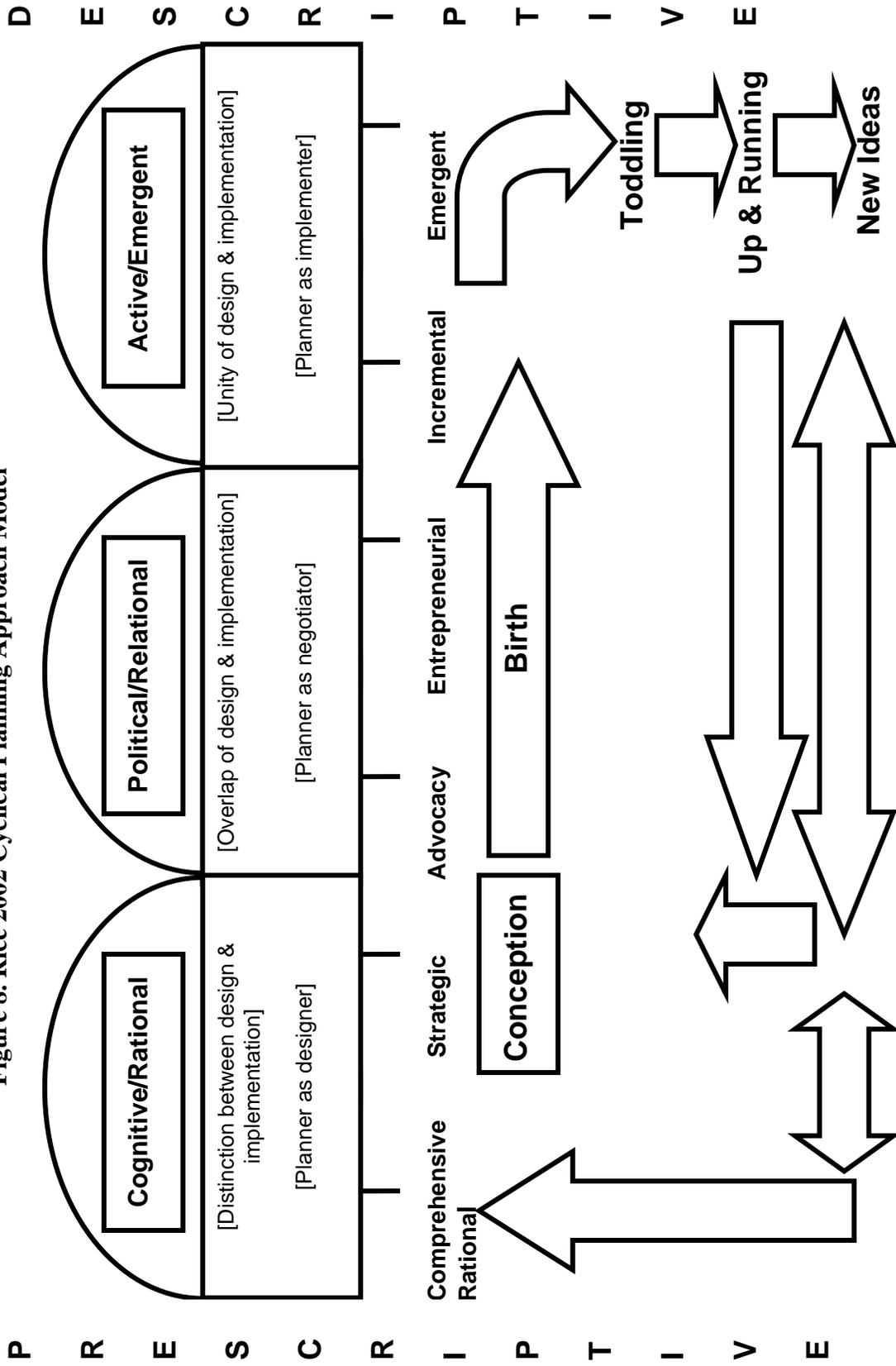
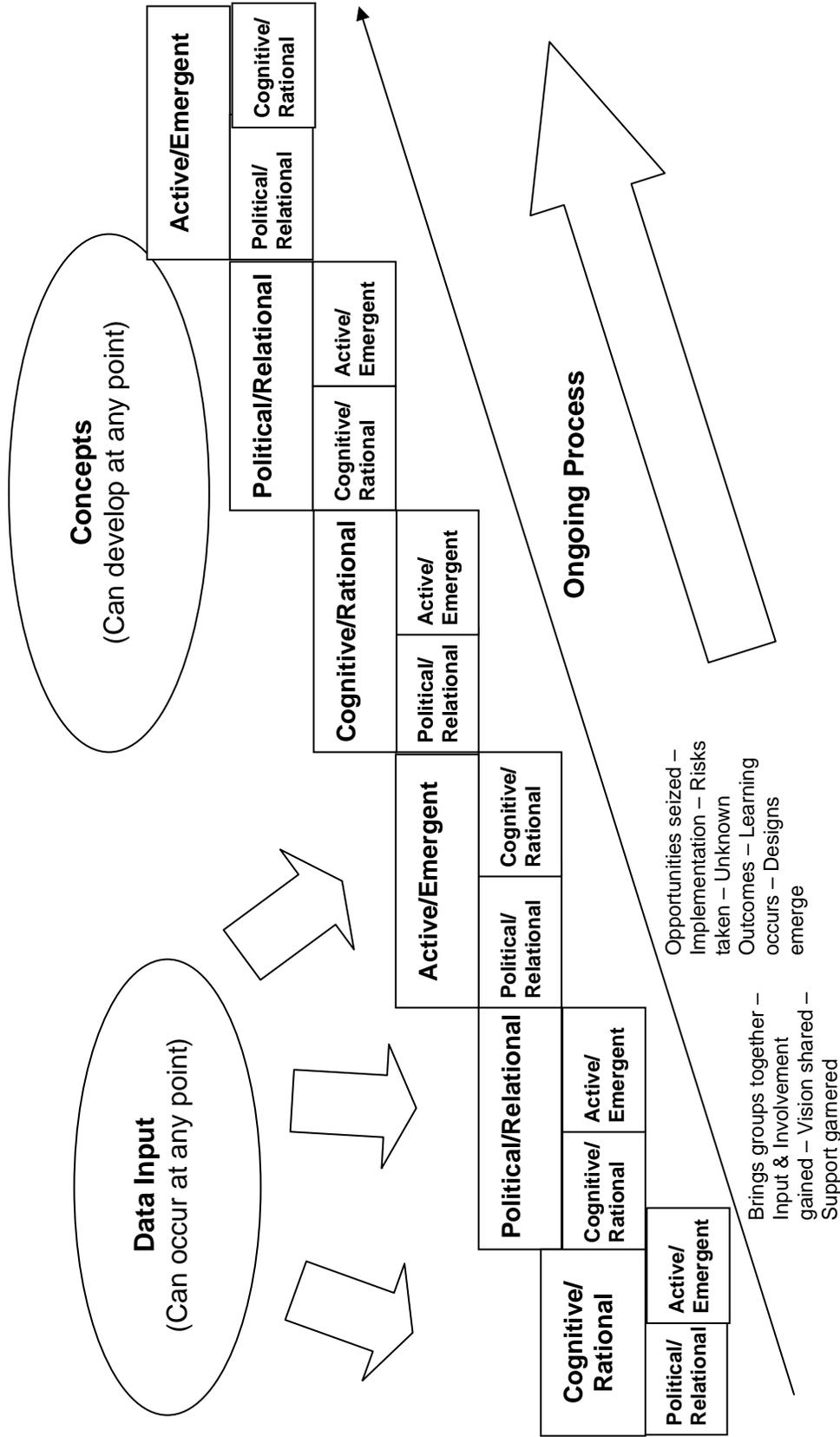


Figure 9. Rice 2002 Linear Planning Approach Model

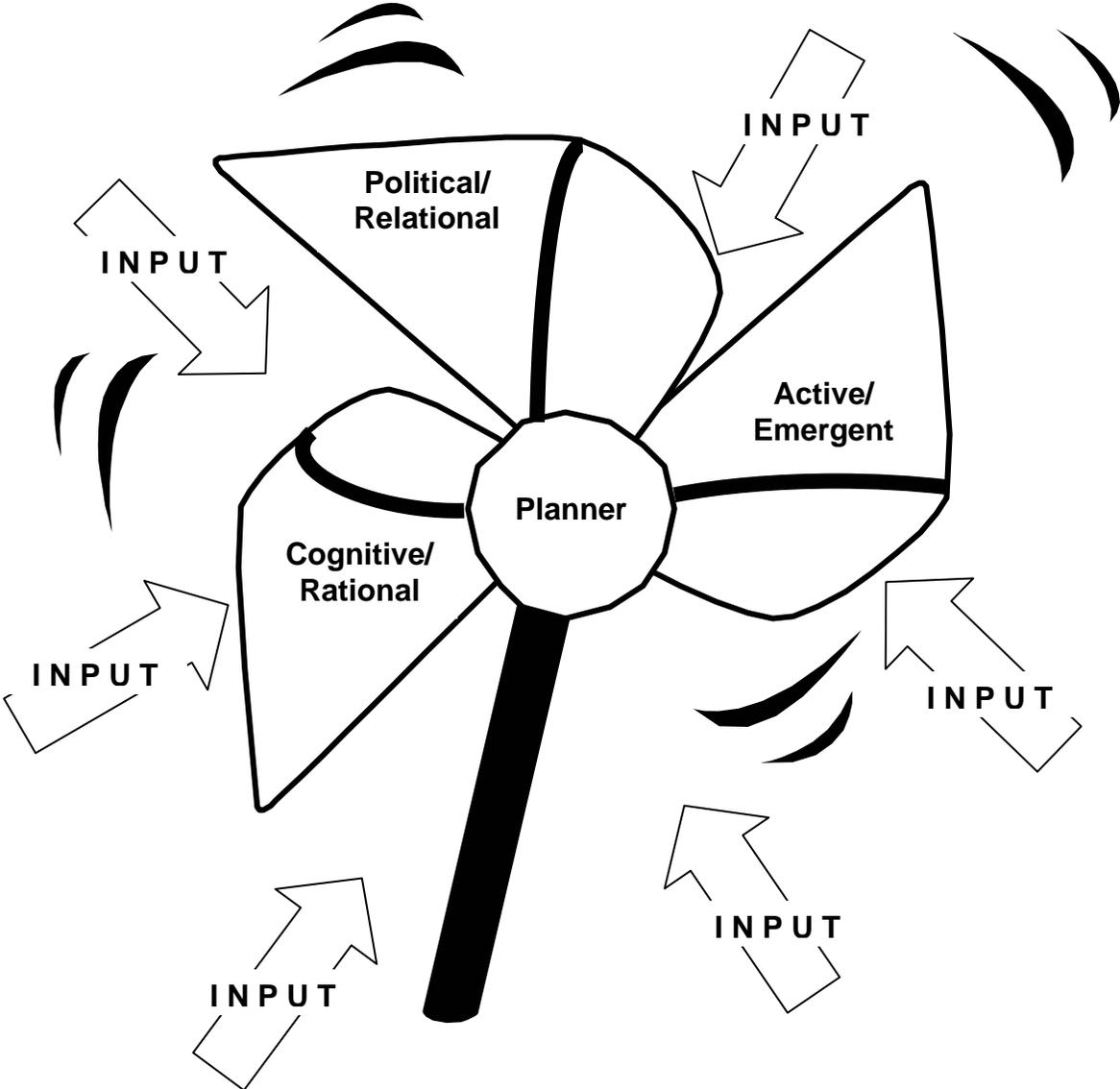


Cognitive/Rational, Political/Relational and Active/Emergent umbrellas. The linear model does include a cyclical motion in that the planning approaches are repeated indefinitely. The model is presented as a straight line with an upward slope to indicate that the stages of development are building upon each other.

This researcher would like to propose an adaptation of those two models called the pinwheel model (Figure 10). This model gives a more accurate portrayal of what took place during the stages of development of the Texas A&M Career Center technology initiative. The Cognitive/Rational, Political/Relational and the Active/Emergent umbrellas are each folded down with the corners secured in the center by the planning leader. Data input can occur anywhere around the pinwheel and will flow into each umbrella as the wheel turns. The direction of the pinwheel spin is determined by which way the wind is blowing. As the speed increases the umbrellas become blurred and several approaches are used at the same time (Figure 11).

The Texas A&M Career Center technology initiative began the planning process in the conception stage under the Political/Relational umbrella. The Executive Director was the leader, or the wind, that was providing momentum. There was an equal amount of data input coming in from a variety of directions so the wheel stayed stationary throughout the stage of conception. The beginning of the birth stage also started off under the Political/Relational umbrella where creativity and data input was encouraged.

Figure 10. Pinwheel Planning Approach Model

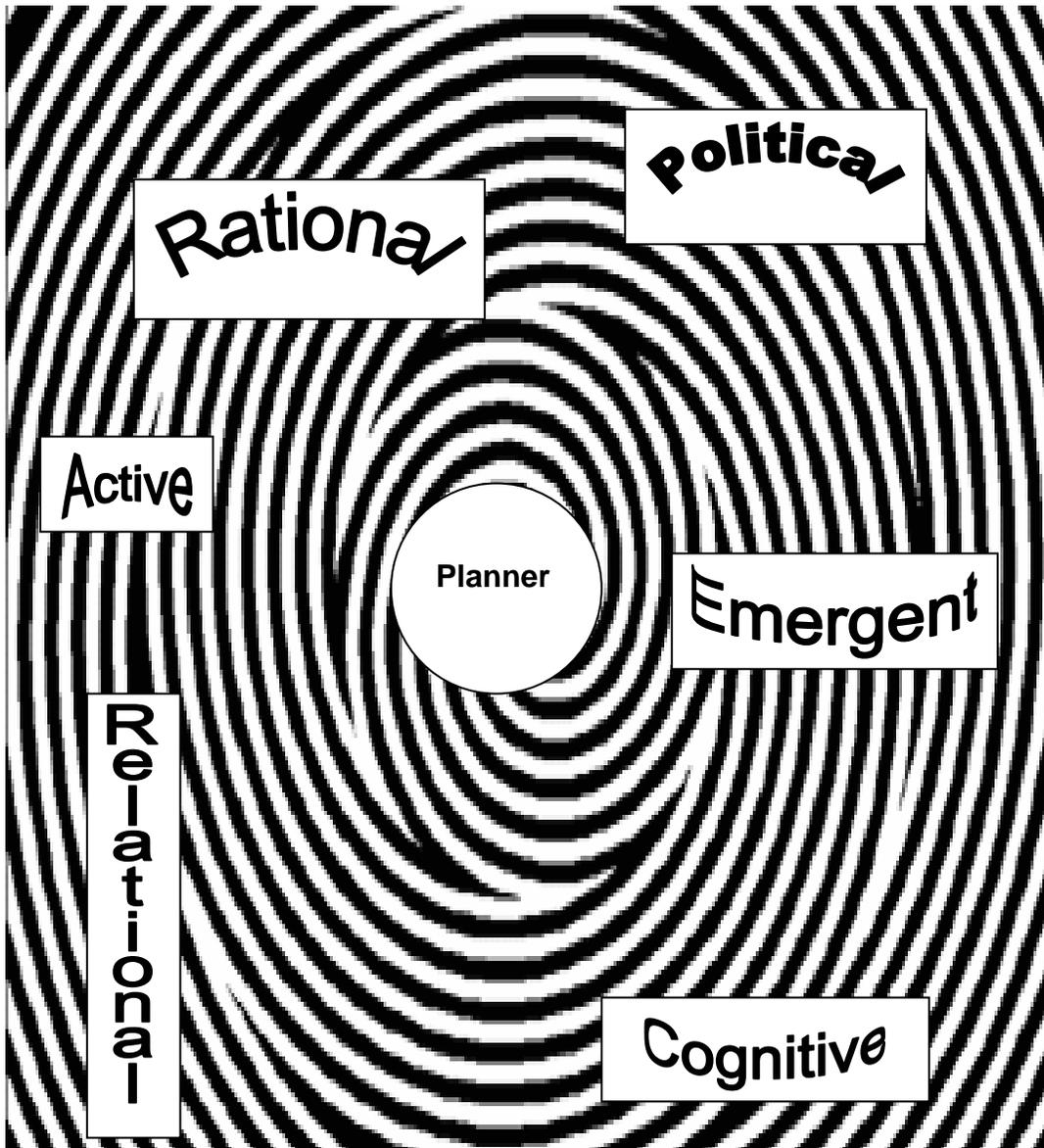


During this stage the Director of Placement became the wind and she began blowing on the wheel from a different direction and moved into the Cognitive/Rational umbrella. During this part of the birth stage the Director of Placement clamped down at the center of the wheel and refused to allow any movement away from the Cognitive/Rational umbrella.

The toddling stage spent the majority of the time at a standstill under the Cognitive/Relational umbrella. The Director of Placement did loosen the clamp on the center of the wheel and employed the Political/Relational umbrella to inspire others to take action. This was done so that the Director of Placement could maintain control of the wheel but also assign specific tasks to other professional staff members without creating frustration or generating questions about the planning process.

During the up and running stage the Director of Placement let go of the clamp in the center and allowed the wind direction to be created by the flow of data. The wheel began turning and hit the Political/Relational umbrella where there was an emphasis on creativity and a movement to inspire others to become leaders of the Texas A&M Career Center technology initiative. This started the wheel moving into the Active/Emergent umbrella and incremental steps were taken and innovations emerged that fostered new learning. During this stage the wheel was turning so quickly that it was difficult to determine which way it was going or which planning approach umbrella was dominate. There is insufficient data to describe the Adolescent stage but this researcher believes that the wheel would continue to spin so quickly that the planning approach umbrellas

Figure 11. Blurred Pinwheel Planning Approach Model



would be blurred and the movement from one to another would be invisible. All three planning approach umbrellas would be in use at the same time.

## CHAPTER V

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

#### Summary

The purpose of this study was to give a detailed account of the strategic planning process used by the Texas A&M Career Center to create the technology initiative. It was also proposed that the study would provide guidance to the researcher and others who will be developing similar initiatives in the future. In an effort to assist career centers nationwide it would be helpful for those career centers to look at others, like Texas A&M Career Center, who have already begun the strategic planning process. The study was also written in response to recommendations for further study made by Rice (2002) to determine if her findings could be duplicated.

Following the lead of Rice (2002) a descriptive case study was chosen so that the researcher could describe the strategic planning process and interpret the findings in a way that would provide greater insight. Qualitative methods, including examination of documents, examination of journals, calendars and meeting notes, and interviews with a few members involved in the process to clarify any questions of memory, were used in this study. The study described the technology initiative and split the development into five stages: Conception, Birth, Toddling, Up and Running, and Adolescence (Rice, 2002).

The first two research questions were, “What strategic planning processes were used to create the technology initiative at the Texas A&M Career Center?” and “How congruent are these processes with the current strategic planning literature?” The

researcher used some portion of each of the strategic planning models illustrated in the literature review and discussed how the models were used in Chapter IV. Rice created a “planning approach continuum” that was used to categorize the approaches that planners use to design and implement a plan.

“Three main “umbrella” approaches were identified: The Cognitive/Rational approach at the left of the continuum; the Political/Relational approach in the middle; and, the Active/Emergent approach at the right (Rice, 2002, p. 173).” The left of the continuum represents those approaches where the planner follows a prescribed method that has been decided upon before the planning process. The middle represents approaches where planners are less prescriptive and solicit input from others as part of the design process of the plan. The right side represents approaches where design and implementation blend together. The model is a continuum starting at the left side of the model where the approaches are more prescriptive ending on the right where the approaches are descriptive.

The third research question was, “How can these processes be presented in such a way as to provide guidance or a conceptual model for others wanting to develop similar initiatives?” Rice (2002) developed two rudimentary models to guide someone in using the three planning approaches. The linear model provides more accurate insight because it illustrates how all three planning approaches can be used at the same time. This researcher presented a third pinwheel model that is an adaptation of Rice’s (2002) two models. The pinwheel model allows for movement in either direction from prescriptive to descriptive or descriptive to prescriptive. The planner is the center of the

model and decides which way to hold the pinwheel to determine direction. Data input is encouraged and comes from every direction. The planner determines the starting point. The Political/Relational umbrella was a good place to start because it encourages input and support from stakeholders. The problem with staying under the Political/Relational umbrella is that it is very difficult to get total agreement on the foundational framework for a plan. The Cognitive/Rational umbrella is the best planning approach umbrella for deciding foundational framework and setting objectives and strategies. The Active/Emergent umbrella is the best place during the early implementation and testing stages because it allows for emergent learning and innovation. Internal and external decisions are able flow together to create a new shared consensus among management under the Active/Emergent umbrella. The pinwheel model is also able to turn so quickly that the umbrella lines are blurred. More than one planning approach may be used at the same time without one being the dominant approach.

The fourth research question was, “Can the research done by Rice (2002) be duplicated with the same results?” The researcher expected that her data would show that she used strategic planning as the one primary planning approach. After examining the data and reconstructing the planning process the researcher realized that like Rice (2002) she used the Cognitive/Rational, Political/Relational, and the Active/Emergent planning approaches. The other finding that supported Rice’s (2002) findings was that all three approaches were used at the same time. The models created by Rice (2002) broadly fit the Texas A&M Career Center technology initiative planning process. Overall this researcher found that Rice’s findings could be duplicated.

## Conclusions

The researcher came to the following conclusions after analyzing the data from the Texas A&M Career Center technology initiative case study.

1. **Rice's model illustrating the political/relational nature of planning was evident at the Texas A&M University Career Center.** Throughout the entire case study the political/relational nature of planning was present. The Executive Director and management team wanted to give input. When their wishes were ignored stumbling blocks in the form of the Executive Director refusing to allow an objective to be approved or the management team debating specific wording would appear. The researcher knows that there is always a need to foster buy in with stakeholders when creating a new plan. As a marketing and sales manager the plan could be sold to stakeholders and as long as they saw the personal benefits the plan was accepted. In academia there are no bonuses or benefits if the stakeholder does not put their fingerprint on the plan. Data input from a variety of sources must be examined to determine if the input is valuable. Allowing stakeholders to brainstorm or verbalize more than one thought when developing an idea can lead to success. Simply listening to the input from stakeholders sometimes satisfies the desire for putting fingerprints on the plan. Therefore, when creating a plan in academia paying attention to the political/relational nature of planning and allowing all stakeholders to give input is essential.

2. **Rice's model depicting the cognitive/rational nature of planning was evident at the Texas A&M University Career Center.** During the cognitive/rational stage the researcher was acting as the planner. This stage is crucial to planning because it was where the design of the actual plan takes place. Objectives, strategies and tactics are formed during this stage. It is important to recognize that Rice's linear and cyclical models try to show that more than one stage can be taking place at the same time. There are times when the planner can get so caught up in controlling the plan and moving forward smoothly that they ignore great ideas or input. It is imperative that a plan be formalized by putting it in writing. Writing down snippets of the plan during weekly meetings is better than nothing but a formal written plan is best. The best scenario is to have a written document that is devoted entirely to the plan that can be used as a guide. In addition to a written plan, notes should be taken during all formal and informal planning meetings so that valuable input is not forgotten. Black & Decker teaches all new sales representatives that if they are told to do four things in a meeting if they do not write them down they will forget one before they get home and one or two more within 48 hours. The same applies to ideas generated in meetings if they are not written down you could forget three of four potentially great ideas. The second part of this directive is to distribute the plan to the management team or decision makers. This may cause more work and frustration in the early stages but it will provide essential support financially and vocally throughout the system from the top. Distributing the written plan will alleviate

suspicion and keep the plan on the forefront of stakeholder's minds. The leader must allow for the political/relational components of planning during all stages.

3. **The active/emergent part of Rice's model was evident at the Texas A&M University Career Center.** This is the stage where the researcher tries to unify the design and implementation of the plan. The researcher/planner was often forced to handle implementation stages. Publicity planning, video taping, and writing sections of the job search training are examples of the researcher/planner acting as the implementer.
4. **Rice's Planning Approach Continuum illustrates the key planning approaches.** Each umbrella of the approach covers the key areas of planning. The Cognitive/Rational shows the heavy emphasis on goal setting, using a SWOT analysis and focuses on the comprehensive, rational and strategic aspects of planning. The Political/Relational umbrella advocates the political nature of planning discussed above. The two main categories are advocacy and entrepreneurial and the planner is considered a negotiator trying to inspire support for change. The Active /Emergent planner is the implementer. Intuition, innovation and learning are intertwined to create strategies that emerge and are used as guides. All of these approaches held true during the Texas A&M University Career Center case study.
5. **All three planning approaches are used at the same time.** The linear and cyclical models created by Rice (2002) illustrate how all three planning approaches are used together. During each stage of development it was important

to consider the political ramifications of each decision and at the same time allow intuition and learning to guide the creation and implementation of objectives, strategies, and tactics. When this is not done resistance to the plan grows and could become insurmountable.

6. **Rice's models did not allow for the chaotic nature of planning.** In each of the models presented by Rice there appeared to be an attempt to force planning into neat stages and cycles. The researcher found no evidence during her case study that the planning approaches could be handled individually, in a linear or cyclical fashion.
7. **The pinwheel model created by the researcher highlights the chaotic nature of planning.** The pinwheel model shows that there can be input coming from a variety of directions causing the planner to have to change direction in midstream. Changes in financial situation, technology, personnel, stakeholder demands and priorities are just a few of the everyday occurrences that introduce chaos to planning. The planner needs be aware that disruptions and chaos are a natural part of planning.
8. **The planning approaches used by the Texas A&M University Career Center technology initiative were congruent with current planning literature.** The Director Placement was most familiar with strategic planning and had been using the Cognitive/Rational and the Political/Relational for over 20 years in her sales and marketing background. The Active/Emergent planning approach had been used while working with a non-profit organization where the

stakeholders were also board members and often demanded implementation of fragmented ideas. This is not an approach that is comfortable for the Director of Placement and it is used mostly during the testing and implementation stage while making adjustments to a strategic plan. The literature review strategic models and approach to planning sections both support the planning approaches used by the Director of Placement.

### **Recommendations for Practice**

The following is a list of recommendations that the researcher feels would be helpful for any person given the responsibility of planning an initiative. They are not necessarily reflective of what was done during the Texas A&M Career Center technology initiative but are a compilation based on what was learned during the course of this study.

1. **Make planners aware of the political nature of planning.** Support from stakeholders is an important part of the planning process. It is crucial for the planner to understand the politics of an organization so that he/she can avoid potential quagmires. The planner should identify the key decision makers and build a relationship early in the planning process. Identifying each group in an organization and what they want will assist the planner when looking for support.
2. **Encourage input from a variety of sources (political/relational).** Data input should be encouraged from internal as well as external sources. Internally asking for input helps to planner garner support because individuals and groups feel like the planner cares about their ideas and is letting them help build the plan. Encouraging internal input also gives individuals and groups a feeling of

ownership of the plan. External sources can often supply a point of view or see things that internal sources are too close to the situation to see or understand.

Ongoing input allows ideas to be refined and built upon.

3. **Train planners in all three planning approaches.** Each planning approach has useful components. The Cognitive/Rational will assist the planner in the formal design of the plan. The Political/Relational highlights the political nature of planning and shows the planner the need to be a negotiator not a dictator. The Active/Emergent shows the planner how to thrive as the implementer of a plan. All three approaches should be used when planning a major initiative.
4. **Provide guidelines or set of expectations regarding the initiative (cognitive/rational).** If the planner is not top management the manager should set some guidelines or expectations so that the planner does not go off in the wrong direction. Expectations or guidelines provide a foundational framework for the planner.
5. **Do not fold to pressures to implement without a plan (chaotic force).** There will be times that stakeholders or managers have a brilliant idea that “just can’t wait.” It is important for the planner to stand strong and say no if the implementation is not in accordance with the plan and may be detrimental to future strategies or tactics. The planner needs to examine the idea and if the implementation is easy and will provide instant credibility or garner support without harming the overall plan then go ahead and implement. It is important that the planner understands and be willing to defend whatever decision is made.

6. **Build a visible support team (political/relational).** Hire and recruit staff members that will be supportive and help garner support from others. A staff member that is well liked and respected can provide credibility and instant acceptance. Make sure that the staff members know who is on your team and hold meetings in the open when possible.
7. **Distribute a formal written plan and provide updates on a regular basis (political/relational/cognitive/rational).** A formal written plan that is distributed is similar to the Good Housekeeping Seal of Approval. When staff members see the plan in writing and know that top management has also seen the plan there is a tendency to acknowledge that this is the plan. The written plan provides everyone with a clear understanding of what is going to happen, who will be involved, and who will benefit. Regular updates show the staff that this is not just another waste of time where a plan is created and then filed away until a new one is created next year. The updates show progress is being made and gives staff members an opportunity to provide feedback.
8. **Build testing and ongoing evaluation into the plan (active/emergent).** Testing a plan or initiative is an essential part of the planning process. The testing phase could uncover fatal mistakes that need to be corrected before implementing. Testing also allows any kinks or new ideas to emerge that could improve the initiative. Evaluation is an area that most planners pay lip service to by including a blanket statement about ongoing evaluation in the plan. Overlooking and not providing a systematic evaluation that provides real data that is specific and

measurable is a major mistake. Without evaluation every initiative that is implemented can be called a success even if it is a dismal failure.

### **Recommendations for Further Research**

There are several areas that arose from this descriptive case study where there are opportunities for further research. The following list provides key areas that the researcher believes would benefit from further research.

1. **Is there any benefit from using one planning approach for an initiative?** The researcher was certain that she would use one planning approach. It would be interesting to see if there are initiatives where one planning approach can be used successfully.
2. **Is it possible to overcome the burden of academia and their political nature?** The political nature of academia is much different from industry. Academia is not driven by results and even if an initiative is successful there can still be angry or frustrated academics because they were not consulted. The chain of command and tenure of employees plays a much larger role in the politics of academia. Quick decisions are not admired and are almost impossible because of the number of academics who must be given an opportunity to examine every detail. It would be very interesting to see study done on ways to circumvent or overcome academics resistance to moving forward quickly without discussing every single word used.
3. **Is one planning approach better than another?** The researcher entered this study with a bias toward strategic planning. This bias was changed and now the

researcher would like to see further study done to determine if there is in fact a best planning approach.

4. **Does the pinwheel model accurately depict other planning initiatives?** The researcher would like to determine if the results from her study could be duplicated using the pinwheel model as a guide.

5. **Is it more beneficial to start an initiative using a certain planning approach?** The researcher and Rice (2002) started their initiatives using different planning approaches. Further study should be done to determine if there is a proper or best planning approach to start the initiative.

#### **Closing Statement**

The researcher has completed the descriptive case study and analyzed the data according to the planning approach continuum. A new model has been created that provide insight to the researcher and hopefully other planners. Recommendations and conclusions have been provided that will hopefully be beneficial to other planners. The descriptive case study provides a story that highlights good and bad planning techniques and the researcher hopes that others will read and learn from this study. The purpose of the study has been fulfilled.

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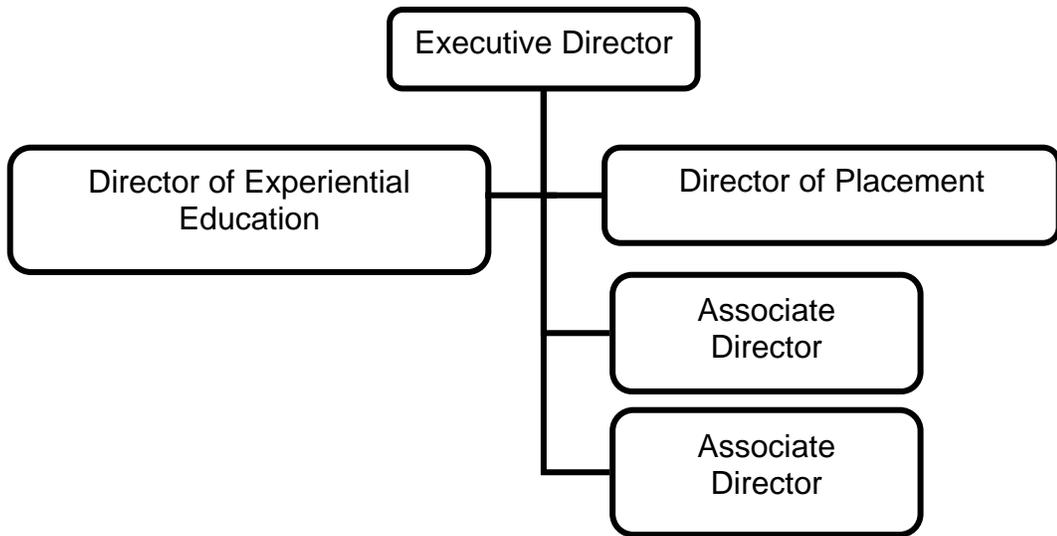
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**APPENDIX A**  
**ORGANIZATION CHART CAREER CENTER**



**Texas A&M Career Center Management Team Organization Chart**

## **APPENDIX B**

### **DIRECTOR OF PLACEMENT JOB RESPONSIBILITIES**

Primary responsibilities are for leadership and management of the organization, including day to day operations, budgeting, and communication with staff. Director shall establish a presence in the community and have the ability to bring staff, volunteers, board members and community together to achieve the common goal.

Responsible for leadership and management of all career center placement personnel. Develops and implements an organization's programs. Assess needs and ensures that program objectives are being met. This position provides direction and supervision to staff, ongoing monitoring of state and/or federal requirements. This individual develops fundraising strategies and oversees all aspects of fundraising programs. Creates goals and solicits funds to meet those goals.

Duties include creating, managing and implementing all marketing programs for the entire career center. Marketing our students to employers as well as marketing our services to current and former students.

The Director will also be responsible for working with all parent organizations and clubs affiliated with Texas A&M University.

**APPENDIX C****NACE MEETING SCHEDULE****Tuesday July 17, 2001**

History and Future of Recruiting on the Internet  
Fine Art of Small Talk  
Diversity Roundtable  
Six Thinking Hats  
Coaching for Professional Presentations  
Attracting and Retaining Talent  
E-Career Services: Innovative Ways to Integrate the Web in Career Services  
Wine Appreciation  
Telework  
First Year Seminars

**Wednesday July 18, 2001**

Feng Shui  
NACE Universal Database  
College Roundtable  
Recruiting and Interviewing Strategies for 2001 and Beyond  
Career Counseling for the Disabled  
Physiognomy – Amazing Face Reading  
Measuring Success – How to get Employees to Take Right Action  
An A-mazing Way to Deal with Change in the Workplace  
E-Learning  
Hand Me Down Dreams  
FISH! Catch the Excitement

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