

Card Sort Methodology: Instrument of Choice

by Paul Stevens, Founder / Director, The Centre for Worklife Counselling

When career coaching takes place, the interaction between skilled helper and client is focused on discovering data about which both can share opinions, debate and resolve. The objective of the skilled helper is to coach and stimulate commitment to specific actions that move the client along the journey towards resolution of their problems.

Since Parsons (*Choosing a Vocation* 1909; also Alfred Binet 1890), instrument developers have sought to facilitate this interaction by designing forms of questionnaires which solicit from their client data about themselves important to this purpose.

Skilled helpers in the 21st century know these instruments as psychometric tests, inventories, stimulus questionnaires, self-search worksheets, personality appraisals, competency assessments and card sorts.

It is the last – card sorts – that are the focus of this article.

Card sorts are my instrument of choice, as a practitioner for 26 years of helping clients of varying nature, ethnicity, social situations with diverse work-life issues and age range spanning 17 to 75 years.

When helping a client search for meaningful career direction options, providing quick fixes leading to possible occupational titles is not my style. I know in each coaching relationship that the client hankers, often urgently, after these. Occupational titles appeal to the client as the answer and end to their current discomfort with what they currently do in their work-life or their lack of employment. Title matching via instrument or computer program is a process that is fraught with inaccuracies and rarely reflects the wide scope of the labour market in any particular community.

Quick fixes leading to possible occupational titles are not my professional style. Sustainable outcomes that enrich the clients' living are my intention.

Sustainable life management outcomes that enrich the clients' lives are my intention. Empowering career self-resiliency for handling change for on-going expected and unexpected events is another. It's why I do this form of work. It is my calling, my purpose. Any other way would be a falsehood to me, an abrogation of

what I hold dear to my existence and life-work.

Role of instruments

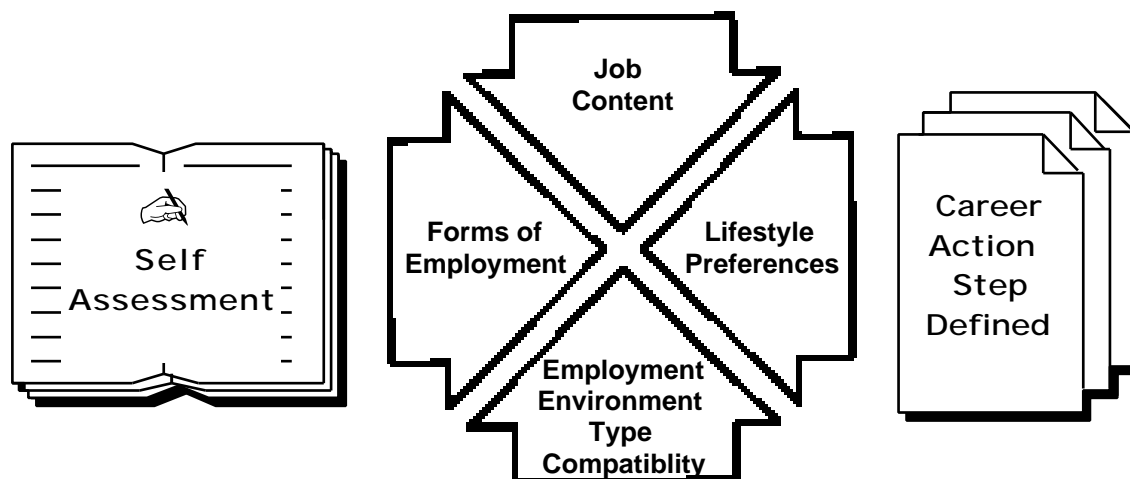
The style of instrument I favour does not provide a job title as an answer but facilitates a reflective exploration by the client. The data output must stimulate their sharing of views and feelings with me, otherwise it has no place in my cache of resources. It must be qualitative, not quantitative, e.g. not a score of an aptitude. It must help the clients to a better understanding of themselves. The instrument must be effective at probing for factors that may lie just below the level of the clients' consciousness or that are not yet at a spoken level.

It must provide structure and comfort to the client in dealing with the difficult and complex self-search task. As with puzzles, I want the instrument to help the client see all parts of essential information come together to form a picture from which resolutions can be made.

The instrument must contribute data to any of the four arrows in Figure 1. When each arrow has been filled in, I guide the client into the exploration phase of their career future determination. This may include matching work roles and industry sectors to the arrows. When completed, this 4-dimensional

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Figure 1 – 4-D Analysis



analysis represents factors that, when matched with their work situation, provides optimum conditions for satisfaction and personal growth.

The instrument I administer must help form a link in the chain where jigsaw pieces of extended self-awareness can be fitted together synergistically. The quality of data contributed by the instrument must be matched by a sensible cost from the supplier. Card sorts meet these criteria as my instrument of choice.

Card sort characteristics

A card sort instrument is a structured way of sorting out or prioritising interests, skills, needs, values or any predetermined array of ideas and facts. The process of sorting reveals much about a client's facility with words, ideas, concepts, approach to tasks, personal style and comfort with thinking about a complex task.

This methodology is termed 'Q-sorting'. It is a process whereby a person models their point of view by rank-ordering items into 'piles' along a continuum defined by a certain instruction (McKeown & Thomas,

1988). The Q-sort is a standardised procedure for assessing the person's self-concept by making comparative judgments of statements about oneself. A basic principle of the Q-sort technique is that items are evaluated relative to each other. In some card sort designs, the person is asked to sort the same Q-sample under two or more variations on the same basic condition of instruction, i.e. ability using skills versus motivation or preference for using these skills.

Card sorts are designed with the assumption that the answers to the client's problems already lie within the person and by a sorting, sifting and selection process they learn how they can resolve issues. The client is in charge of sorting of the data. The responsibility for outcomes, therefore, effectively passes from the skilled helper to the client, where it properly resides.

When clients are in a state of confusion, the step-by-step way of exploring data about self that card sorts are designed to do can produce rapid improvements in their morale and self-confidence. Card sorts frequently produce information that the client knows

already and the value of this confirmation should not be underestimated. They also create awareness of new information relevant to work-life problem solving. Their nature is non-threatening. Card sorts do not look like tests nor are they.

Card sorts are a relatively recent innovation (mid-1960s) in career development support for youth and adults. The card sort process differs from psychometric testing in several features, most notably by not having a scoring system (i.e. it is not a standardised test). Instead, card sorts feature, as a process, the uncovering of the client's valuing of various statements, understanding what and how the client differentiates between them and delineating the most important for their unique selves in their career self-review and action determination.

When used in a one-to-one situation, card sorts:

- develop a teamwork problem-solving approach between the client and the helper;
- enable a 'contract' about next step to be agreed upon, usually involving further

reflection and resolution about items selected.

When used in a group training situation, card sorts:

- stimulate healthy debate among participants;
- enable the trainer/coach to observe each person's learning progress and intervene where assistance is required.

Card sorts are especially helpful with ethnic and minority groups. In today's increasingly multi-cultural world where the norming of standardised psychometric instruments beyond Anglo-Saxon western culture lags behind, card sorts offer another distinct advantage. Interpretations are not dependent on pre-determined norms and, in fact, lacking norms we as skilled helpers are more inclined to listen carefully to our client's perceptions of what the card sort data means to them.

The transferability of card sorts across cultures is significant. I have administered successfully to clients the same card sort in Sweden, South Africa, Australasia, Ireland and SE Asia.

The card sorting process can be immediately engaging to the client and contribute to the bond-

ing that is so important in establishing and maintaining a working alliance. Alternatives, such as inventories, computer-based career systems or reading career materials demand less or no interpersonal contact between skilled helper and client when being completed.

The simplistic appearance of card sorts can lead to assumptions that the client knows what to do with them. Explaining what is their purpose in your helping relationship is important before their administration.

Brief the client thoroughly before the sort is started. Refresh your understanding of the instrument by regularly re-reading the Administrator's Manual between consultations. Never administer an instrument which you have not completed yourself.

A reluctant or sceptical client can be engaged quickly by the self-exploration process. A highly verbal client can become more focused following completion of a card sort and talk less volubly. A client who wants a lot of structure can be asked to write or make lists of observations or career action step possibilities,

while a client who would progress better with less structure can be left free to talk about their data and related matters.

Card sorts can be useful at different stages of the client's journey towards resolutions of their dilemma. There are card sorts for career options analysis and others which assist job hunt coaching.(Figure 2).

Probing questions

As you encourage your clients to express their opinions or reasons for putting cards in particular piles or sequences, you have an opportunity to exercise your skill at probing questions – an art in which all skilled helpers in one-to-one consultations should strive to excel.

Probing questions press the client for their observation of clues about the strength or logic of card selections and discards. You would not necessarily obtain this insight when clients complete an inventory, i.e. a pen-and-paper instrument. Your probing questions help the process of authenticating choices of cards made by the client. Consider the sample of probing questions in Figure 3.

Probing questions minimise the risk of the client depending too much on the coach for answers. By extending and reinforcing what the client is saying, you are recognising their perceptions – the one's that are most important. You can always add your perceptions, but you are building on what you are being told by the client, rather than the other way around.

By using probing questions, you become more astute at observing significant influences

Figure 2 – Card Sort Instruments by Paul Stevens

Career Action Constraints Card Sort Kit *

Career Planning Values Card Sort Kit *

Career Quiz Card Sort

Life & Work Planning Resource for youth and young adults

Occupational Work Setting Card Sort Kit

Portfolio Life-Work Card Sort Kit

Preferred Skills Analysis Card Sort Kit *

Résumé Training Card Sort Kit

Work Satisfiers Card Sort Kit *

* Available in Chinese Mandarin

in the pattern of the card sort results for each client. You will observe how much easier it is with card sorts for the client to recognise themes in their data. Let these themes flow, be commented upon and then help client to make sense of them.

Cautions

The career coach needs to balance the use of instruments with other interactions with the client. These interactions are: hearing their story; structured questioning; debating strategies; exploring feelings; assessing client resources and self-resiliency for implementing resolutions being made during consultations.

The 2004 President of US National Career Development Association, Spencer Niles, warns, "some practitioners conceptualise career counselling as a process of administering tests and providing occupational information. Such views freeze career counselling at the turn of the last century."

The value of active listening must not be neglected. It's not telling the client what the instrument result says. It is listening to the client's interpretation of their own data that is important. What self-insights have been prompted by the instrument? What conclusions are being formed? What linkages is the client making with their data from other instruments already administered?

New technology is beginning to embrace card sort instruments. When you locate computer-based

Figure 3 – Sample of Probing Questions

- What new information comes from your selection?
- What confirming information comes from your selection?
- How do you feel about your results?
- What themes do you see among the results?
- What are the messages from this data?
- In what direction do you think the data points?
- What career options that you have been considering could be eliminated now that you have this data?
- What career issues does the data not help you with?
- Are you clearer about what to hold on to or do more of; what to let go; and what to take on and begin?
- How do you feel about making a career action step decision now?

delivery applications, particularly on the Internet, you need to exercise caution. Is the site safe, secure and respectable? Are there precautions, processes, personal data to share or policies to abide by before the client accesses and completes on-line? How could using on-line usage by your clients affect your quality of service and their progress? Just because the instrument is available on-line rather than from your resources shelf does not absolve you from the ethical considerations for which you as a skilled helper are always responsible.

We need to satisfy ourselves that the rigor of research, design, development, sampling, cultural flexibility and meaningfulness of results are present in any instrument, whether offered on-line or supplied in hard copy.

When you administer card sorts in one-to-one career coaching consultations, enjoy observing their extraordinary power to

release previously suppressed thoughts from the client. Observe the increase in confidence in their own judgement as each client moves along the route to leaving your care as a career self-resilient person.

One of my former students summed up this enjoyment by commenting:

"Card sorts allow us to look out for clues that unveil the clients' touchstones, or things that are meaningful to them. A clue may just be light in their eyes when speaking about something, a whimsical voice describing what 'got away' in their past, a reluctant dismissal of a card that indicates a real interest but hesitancy in highlighting it. Card sorts challenge me to be a true listener tuned into the slight subtleties of clients' responses to stimuli from the cards."

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