



# IMPLEMENTING CONNECTED CAREER ADVISING: A TOOLKIT TO MAXIMIZE CAPACITY AND COHERENCE FOR STATEWIDE IMPACT



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## *The New Skills ready network*

*New Skills ready network*, launched by JPMorgan Chase & Co. in 2020, bolsters the firm's continued investment to assist people in preparing for and accessing careers in the future of work. Advance CTE and Education Strategy Group worked with sites to improve student completion of high-quality career pathways in six US communities. The six *New Skills ready network* sites are: Boston, Massachusetts; Columbus, Ohio; Dallas, Texas; Denver, Colorado; Indianapolis, Indiana; and Nashville, Tennessee. Through the *New Skills ready network*, these sites formulated new partnerships among local school systems, higher education, employers, community partners, and government entities to develop and scale pathways and policy recommendations that give underserved students access to higher education and real-world work experiences that lead to high-wage, in-demand jobs.



## WHAT IS CONNECTED CAREER ADVISING?

Connected career advising is an intentionally designed ecosystem that incorporates the following elements within and across education, workforce, and community settings to create full systems of support that are accessible to all learners:



**CLEARLY DEFINED ROLES AND RESPONSIBILITIES** FOR CAREER ADVISING PROFESSIONALS



**ESTABLISHED STRUCTURES AND CONSISTENT ROUTINES** TO ENSURE THAT THE SUPPORT OFFERED TO LEARNERS IS COHERENT AND EFFECTIVE



**ONGOING AND TAILORED PROFESSIONAL DEVELOPMENT** FOR CAREER ADVISING PROFESSIONALS



**COLLABORATIVE, CROSS-SECTOR PARTICIPATION** BY KEY EXTERNAL PARTNERS TO BUILD A CONNECTIVE SYSTEM THAT WORKS FOR LEARNERS, EMPLOYERS, AND COMMUNITIES

## EXPLORATION OF CONNECTED CAREER ADVISING

In December 2024, in support of the *New Skills ready network* initiative, Advance CTE and Education Strategy Group convened a Career Advising Shared Solutions Workgroup (SSWG) to explore how states support the connection of career advising systems across a lifetime. Members of the SSWG represented national organizations, state education agencies, intermediaries, institutions of higher education, and K-12 schools. These national, state, local, and *New Skills ready network* leaders and practitioners elevated promising

practices, highlighted state policies, and shared ideas. Their input and recommendations led to the development of the definition of connected career advising, background context, this toolkit, and other resources to support state and local leaders in this work.

This toolkit is a companion to Advance CTE's [Connected Career Advising: An Explainer on Maximizing Capacity and Coherence for Statewide Impact](#).

# ABOUT THIS TOOLKIT AND HOW TO USE IT





## Purpose

This toolkit is designed to help state leaders understand and build knowledge about the key elements and actors in connected career advising. It includes activities for leaders to evaluate current system design and practices against key metrics for connected career advising systems.

The knowledge-building throughout the toolkit is intended to empower leaders to identify gaps as well as areas of current and potential alignment in systems. Additionally, the toolkit contains activities that guide the user to apply a learner-centered mindset—prioritizing the needs and current journey of users across a variety of experiences—when evaluating career advising systems.

## Toolkit Components

The toolkit contains the following components for understanding, knowledge-building, evaluation, and assessment:

<b>SECTION 1:</b>  <b>User Persona Activity</b>	<b>SECTION 2:</b>  <b>Common Terminology Norming</b>	<b>SECTION 3:</b>  <b>Role Mapping Tool</b>	<b>SECTION 4:</b>  <b>Assessment Tool</b>
Evaluate career advising system design based on ready-made user prototypes, or create your own.	Explore terms and roles linked to career advising.	Identify current roles, responsibilities, and resources across state career advising systems.	Assess the capacity and coherence of the current career advising system across four key elements.

Each component includes reflection exercises or questions at the end of the section.

## Using the Toolkit

The following is the recommended sequence for completing the toolkit:

-  **SECTION 1: USER PERSONA ACTIVITY | 3**
-  **SECTION 2: COMMON TERMINOLOGY NORMING | 9**
-  **SECTION 3: ROLE MAPPING TOOL | 11**
-  **SECTION 4: ASSESSMENT TOOL | 14**

Although using the Role Mapping Tool prior to completing the Assessment Tool is strongly recommended, it is not required. The toolkit should ideally be completed by a cross-sector group of state and local actors involved in career advising.

## Use Cases

The toolkit has multiple uses in cross-sector settings in which statewide career advising efforts are discussed. The uses include, but are not limited to, the following:

- ▶ Guide conversations regarding Carl D. Perkins Career and Technical Education Act (Perkins V) state plans and connected local supports; goal-setting for secondary, postsecondary, and workforce performance and outcomes; strategic planning; and planning for executive initiatives brought forth by governors, legislative bodies, and statewide leaders.
- ▶ Inform professional development opportunities for state and local leaders across education, workforce, and community settings.
- ▶ Identify legislative, policy, and funding actions and advocacy that are necessary to strengthen or drive change in career preparation ecosystems.
- ▶ Strengthen processes and resources to communicate and raise awareness among learners and families about information about available career advising supports.

Although this toolkit can help drive or improve existing work or enhance a state-level framework around connected career advising, it can also be adapted by local education agencies, institutions of higher education, and workforce boards to spark discussions at the local level.



## SECTION 1: USER PERSONA ACTIVITY

To fully assess system effectiveness, considering the user experience is important. In this case, groups of learners have different needs and therefore have different journeys through and with the people, institutions, and supports that are part of career advising. What is the ideal journey for each user? What is the reality of their journey as your state's system is currently designed?

User personas are a “fictional but realistic character[s] based on research and actual data” that reflect the real-life experiences of individuals connected to a product or system.<sup>1</sup> Personas typically include the demographics of the individual as well as an in-depth profile of their needs, motivations, circumstances, and goals for connecting to a product or system.<sup>2</sup> These personas can be used by your team to ensure that systems are designed to fully support the varied needs of users based on their circumstances and environment.

Personas are based on assumptions. Therefore, whenever possible, user personas should be assessed for accuracy and bias through audience interviews and/or internal testing.<sup>3</sup>

With your team, use the sample user personas and guiding questions to assess the ideal and current journeys occurring in your career advising system, specifically for learners and the advising professionals supporting them. Consider the opportunities and challenges that emerge when determining your rating in the Assessment Tool.

Use the supplemental template and reflection questions to create personas that best align with your state and to document your answers.



## Martina

**Age:** 18

**Geography:** Suburban

**Occupation:** High school senior, works in a restaurant

**Education:** Some high school

### Background

Martina is from Venezuela and has lived in the United States for 6 months.

### Languages

Spanish (native), English (novice)

## MOTIVATIONS & INTERESTS

- Her mother was a nurse in Venezuela.
- Her parents have full-time work, but their professional credentials did not transfer in the United States.
- She desires to help families navigate the healthcare system.
- She wants to set an example of success for her three siblings.
- She is very adept at learning about and connecting systems, including competency in life and plant science.

## NEEDS

- English language support for herself and her family
- Transportation access
- Tuition support

## GOALS<sup>19</sup>

### LEARNING

go to college to pursue a career in healthcare, English fluency

### EARNING

become a nurse to provide for her family, work in the healthcare field while in college

### LIVING

have time to spend with friends, save money to buy a car

## JOURNEY

Martina's choice to pursue a healthcare career is a natural fit given her passion for helping others and diving into how systems work as well as her parents' professional experience. However, she is navigating structural barriers that lead to inadequate career navigation support for multilingual learners.

When exploring how to pursue a nursing career, Martina tries to look up available Career Technical Education (CTE) programs online, but the PDFs of program descriptions and course pathways are available only in English, limiting access for multilingual learners such as her. When she mentions this struggle to a teacher, a meeting with a school counselor is scheduled, including a family parent liaison fluent in Spanish. Unfortunately, all healthcare CTE programs in the county are full or closed for enrollment by the time the meeting could be scheduled.

In the meantime, the school counselor directs Martina to a multilingual online career assessment to explore more careers connected to healthcare. They also connect her to an internship as an administrative assistant at a medical office, with the salary and a public transit card paid for by the county school system. However, the hourly wage is lower than Martina's current job as a waitress. Martina faces a decision: Continue her restaurant job and pursue a credential while taking the required courses to graduate, or pursue the healthcare internship with lower wages and limited transportation?



## Olivia

**Age:** 40s

**Geography:** Urban

**Occupation:** Career coach at a two-year college

**Education:** Associate degree in business management, bachelor's degree in human resource management, human resources management certification, career coach certification (in progress)

### GOALS

#### LEARNING

complete career coach certification, attend state conferences

#### EARNING

establish part-time consulting work to fill her salary gap

#### LIVING

be involved in the community, help her child navigate her career journey

### Background

Olivia is a newly hired career coach who previously served as a human resources professional for multiple K-12 school districts and an education technology provider. She desired a career pivot to have the opportunity to work directly with learners.

### Languages

English (native), American Sign Language (intermediate)

### MOTIVATIONS & INTERESTS

- She desires to shift from hiring to directly supporting the next-generation workforce by helping learners better market their skills.
- She has a high-school aged child with an insurance youth apprenticeship.
- A family member is deaf.
- She is a volunteer youth soccer coach.

### NEEDS

- Knowledge about learner supports
- Strong partnerships
- Peer mentorship for advice on navigating and closing resource gaps

### JOURNEY

Olivia is excited to apply her knowledge of the hiring process from her prior positions in human resources to directly support learners in preparing for and choosing experiences for their desired careers. In the early days of her new job, she learns that her training is limited to basic career advising techniques and that she still knows little regarding what supports and programs are available to her learners. She enrolls in a national certification program to fill her knowledge gaps and also emails other local coaches to introduce herself and inquire about resources.

A variety of learner needs emerge, including course accommodations, translation services, and family members also in need of career coaching. Unfortunately, many departments that support these needs are understaffed and therefore are already struggling to provide support for other campus programs. Olivia is working to find long-term, meaningful solutions, starting with partnering with a community tutoring program that provides multilingual information on how to navigate various campus offices.

As Olivia settles into her role, she realizes that most of her learners are referred from only three professors who promote the program. However, she struggles to have enough resources to support just those learners. She faces an important question: How can she ensure that the learners who are most in need are referred to her while also expanding her capacity and knowledge to provide services?



## Andrew

Age: 30s

Geography: Rural

Occupation: Web and graphic designer, part-time gig worker for extra money

Education: High school diploma, multiple computer science and graphic design certifications, associate degree in computer science (not completed)

### GOALS

#### LEARNING

complete degree or certification for career pivot

#### EARNING

increase salary and stability to provide for his family

#### LIVING

have a job relatively close to home, help other veterans

### Background

Andrew is an Army veteran who for the past 8 years has been employed as a web designer for a small local business. After multiple company layoffs and concerns about the impact of artificial intelligence on his occupation, he is interested in a career pivot to advanced manufacturing production management. However, the industry is just emerging where he lives, and openings are limited.

### Languages

English (native)

### MOTIVATIONS & INTERESTS

- He is married with a child and expecting another child soon.
- He is a member of a veteran video game league.
- He would like a career that requires being out in the field and uses the logistics management skills he gained during his military service.

### NEEDS

- Dependable income
- Career coaching and labor market information on advanced manufacturing opportunities
- Retraining programs that accommodate full-time work and family obligations

### JOURNEY

Andrew is worried about his company's next round of layoffs and wants to start preparing for a career pivot. Advanced manufacturing is an emerging field in his community and provides opportunities for Andrew to use skills he gained from the military in building processes and managing personnel. Andrew first visits the U.S. Department of Veterans Affairs website but struggles to find resources for veterans that fit his needs. A friend encourages him to connect with his local American Legion chapter, which provides him with a veteran mentor and connections to a state job center.

Several options emerge. Andrew could stay in his current job and start an associate degree program in advanced manufacturing. The program has federal and state tuition assistance but limited work-based learning opportunities. While there are advanced manufacturing apprenticeships, openings are limited. Some internships for veterans would allow Andrew to receive on-the-job training while completing his degree, but they require at least 20 hours per week and are 40 miles away.

Andrew faces a decision: Stay in his current job and begin his degree program for advanced manufacturing, or leave his job for a temporary work-based learning opportunity that could accelerate his career pivot and lead to a more secure apprenticeship.



## REFLECTION

What strengths within your career advising system emerge based on the sample personas?

What areas for growth within your career advising system emerge based on the guiding questions and sample personas?

### EXERCISE: Create Your Own Leader and Learner Personas Template

This activity allows you to apply the structure from the sample personas in the previous section to evaluate how leaders and learners in your state or community are being served by career advising systems. Ideally, your personas should consist of at least one learner and one leader.

#### STEP 1 CHOOSE YOUR LEARNER/LEADER POPULATION OR ROLE.

##### LEARNERS

What populations and/or identities are most prevalent in your state or community? What populations or identities are not well represented?

What are the common education and employment transition points for learners/workers in your state or community? Are any new trends emerging?

##### LEADERS

What roles connected to career advising need to be examined (e.g., new roles, roles with shortages, complex roles)?

What populations and/or identities are most prevalent in your state or community in this role? What populations or identities are not well represented?

#### STEP 2 DEVELOP EACH PERSONA.

As you develop each persona, consider the following guiding questions to map the career advising journey of each user in your state or community:

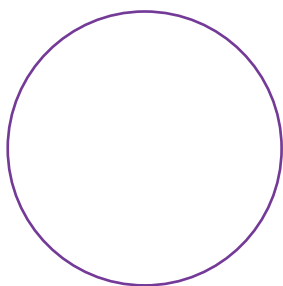
What are recent/frequent career advising success stories or challenges that should be documented in a learner or leader journey?

What journey does the learner/leader need to take to meet their goal? What are the entry points, and what are the milestones along the way? Whom do they interact with during their journey?

What communication channels currently exist for the learner/leader to learn about the information/resources they need to succeed? Do these channels align with how the learner/leader typically receives information?

What is the ideal scenario for how the learner/leader accesses and receives the information and supports they need to be successful? What is working, and what barriers exist?

What major current state or regional initiatives support learner and work populations?



**NAME**

Age:

Geography:

Occupation:

Education:

**GOALS**

**LEARNING**

**EARNING**

**LIVING**

Background

Languages

**MOTIVATIONS & INTERESTS**

**NEEDS**

**JOURNEY**



**REFLECTION**

What additional areas for growth within your career advising system emerge based on the guiding questions and sample personas?

What is one immediate action step you or your team can take to initiate positive change?



## SECTION 2: COMMON TERMINOLOGY NORMING

Numerous terms describe the career-related services provided by a range of professionals in various systems. Following are several definitions to establish some understanding of these commonly used terms.

**Career and Academic Planning Services:** This umbrella term can include meaningful career conversations and outcomes; individual, career, and academic planning processes; programmatic initiatives; instruction, appraisal, and advisement services; assessment and delivery interpretation; and thoughtful mapping of current and future possibilities.

**Career Advising:** According to the Coalition for Career Development Center, this term refers to services “to develop youth and adults’ self-exploration capabilities, advance career exploration opportunities, and enhance planning skills.”<sup>4</sup>

**Career Coaching:** According to the National Association of Colleges and Employers, this term refers to “solutions, insight, and action. It is a positive approach that focuses on a client’s capabilities, helping him or her to practice and hone skills needed in the job search. Coaching is active, focused, positive, and outcome oriented.”<sup>5</sup>

**Career Counseling:** According to the National Association of Colleges and Employers, this term refers to “establishing a therapeutic relationship and confidential alliance with clients using core counseling techniques requiring adherence to all state and federal regulations related to counseling.”<sup>6</sup>

**Career Development:** According to the National Career Development Association, this term refers to “meeting career goals through information management and decision-making, while mastering employability skills and integrating world conditions.”<sup>7</sup>

**Career Readiness:** According to Solberg et al., this term refers to “both developmental readiness (level of exploration, awareness of implications, maturity) and the academic, technical, social and emotional skills of a person to find, acquire, and keep an appropriate job, and manage transitions to new jobs.”<sup>8</sup>

Professional associations, nonprofit organizations, and states may develop their own guidance or frameworks that feature terminology. The South Carolina Coordinating Council for Workforce Development created the *Education and Workforce Dictionary* in 2021, which has been updated to help inform readers about the terminology, definitions, and acronyms used in education and workforce systems.<sup>9</sup> Illinois published the *Illinois Career Pathways Dictionary* in 2018 to include a state definition for career pathways and terms related to career pathway programs and system elements.<sup>10</sup> The Colorado Workforce Council has a similar *Talent Development Glossary* featuring terms such as *career awareness and exploration*, *career counseling and planning*, and *college and career readiness*.<sup>11</sup>

### Additional Resources

Advance CTE—[National Career Clusters Framework](#)

Coalition for Career Development Center—[Five Pillars Solutions Framework](#)

Colorado Career Coaching Collaborative—[Career Coaching](#)

Jobs for the Future—[How State Policy Can Transform Career Navigation for Young People: A 50-State Analysis](#)

National Association of Colleges and Employers—[What Is Career Readiness?](#)

National Career Development Association—[National Career Development Guidelines](#)



## REFLECTION

How are the following terms defined in your state, institution, school, and/or community?

TERM	DEFINITION(S)	SOURCE
Career and Academic Planning Services		
Career Advising		
Career Coaching		
Career Counseling		
Career Development		
Career Readiness		



### Defining Roles and Responsibilities: Role Mapping Tool

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Greater clarification of roles that deliver or support career advising and their responsibilities can enhance cohesion, allow for better communication across roles, and serve learners more efficiently. This Role Mapping Tool empowers leaders to view the entire landscape of career advising in their state or community and identify where to improve connections to maximize advising capacity and impact.

This activity should be conducted prior to completing the Assessment Tool. [\[LINK\]](#)

#### Instructions

##### STEP 1

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List all roles that deliver or support career advising. Identify whether the roles are at the state, regional, or district/community level and which populations they serve.

##### STEP 2

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In one to two sentences, describe the key tasks and areas of authority for each career advising professional and additional details about the population(s) they serve.

##### STEP 3

---

Identify any gaps in career advising support based on learner levels, learner populations, or learner needs. Consult available learner data, surveys, etc. to support this work.

##### STEP 4

---

Identify any opportunities for collaboration or improved efficiencies within and across roles. Consider how common guiding documents, as well existing initiatives and/or mandates, can serve as a “north star” for potential adjustments.



PROFESSIONAL ROLE	LEVEL	POPULATION SERVED	DESCRIPTION OF KEY TASKS AND RESPONSIBILITIES	OBSERVATIONS AND OPPORTUNITIES TO CLOSE GAPS
Career coach	Regional State	Postsecondary Workforce	Each career coach: <ul style="list-style-type: none"><li>• Serves two to three community colleges.</li></ul>	<ul style="list-style-type: none"><li>• Need connection to coaches on other campuses.</li></ul>



## REFLECTION

Where do responsibilities overlap across multiple roles? Does the overlap make sense, or are there areas for potential consolidation?

Are there tasks/areas assigned that do not have enough capacity across roles to be completed? If so, what could be moved to create additional capacity?

Are there roles with too many assigned tasks? If so, what realignment should be considered to maximize capacity within that role?

What roles currently have effective routines for collaboration and communication? How can those routines be applied to connect other roles?

Are all roles informed about each other's task/area of authority? Are roles informed about the overlap of their respective tasks with other roles? If not, how does that affect a learner interacting with that role?

Do the individuals that oversee these roles communicate about current and future work? If not, how can that communication occur within existing or new processes?

If responsibilities shift across roles, what professional development is available or needs to be created to support a smooth transition?



## SECTION 4: ASSESSMENT TOOL

This Assessment Tool breaks down each key element into core criteria so that you can analyze existing practices and policies and provide a current tier rating. Doing so provides a landscape analysis to assess the capacity and coherence of current career advising systems. To use this tool, review the key elements (Part 1), complete the Assessment Tool (Part 2), and plan your next steps (Part 3).

### PART 1: Review the Key Elements

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The following elements are explained in the companion resource, [Connected Career Advising: An Explainer on Maximizing Capacity and Coherence for Statewide Impact](#).



**KEY ELEMENT 1:** DEFINE ROLES AND RESPONSIBILITIES



**KEY ELEMENT 2:** ESTABLISH STRUCTURES AND ROUTINES



**KEY ELEMENT 3:** PROVIDE COHESIVE PROFESSIONAL DEVELOPMENT



**KEY ELEMENT 4:** ENGAGE CRITICAL PARTNERS FOR COHERENCE AND CONNECTIVITY





## PART 2: Complete the Assessment Tool

### Instructions

#### STEP 1

Review the core criteria aligned with each key element.

#### STEP 2

Examine each tier and its conditions by reading the descriptions provided under “1–Emerging” and “4–Strong.”

##### Tier definitions:

##### 1–EMERGING

This policy or practice component is not yet defined or is just beginning to emerge. It meets few, if any, of the criteria listed.

##### 2–BUILDING

This policy or practice component has some bright spots, but many improvements still need to be made. It meets some of the criteria under 1, but key considerations allow for more optimism.

##### 3–PROMISING

This policy or practice component is fairly well developed, though some improvements still need to be made. It meets some but not most of the criteria under 4 and is considered to be more developed than a 2.

##### 4–STRONG

This policy or practice component is extremely well developed and effective, even if minor adjustments still need to be made. It meets most of the criteria listed under 4.

#### STEP 3

Select a rating of 1, 2, 3, or 4 based on how your current policy or practice compares to the conditions in the tool. The conditions are provided only for the low and high ends of the assessment, though states may fall somewhere in between.

#### STEP 4

Provide evidence for the tier rating. Adding links to actual webpages or documents is strongly encouraged.

#### STEP 5

Select an overall rating for the key element.

### TIP

You are strongly encouraged to choose only one of these four rating categories and not allow half-point ratings, which can weaken the prioritization of the four key elements. Keep in mind that this system is not a mathematical formula but rather a subjective rating based on objective evidence found in your existing state policy and current practice. Achieving a 4 rating in all categories is aspirational—an ideal future state that stakeholders are collaboratively working toward. States may have political or structural limitations to achieving a 4. Do not let this discourage you, but instead adapt this tool to your particular state, education or workforce system, or institutional context. These ratings will help you prioritize and focus on conditions in most need of further review, exploration, and revision. The core criteria are examples, and you are welcome to adapt or develop your areas to further assess your state.



## KEY ELEMENT 1: DEFINE ROLES AND RESPONSIBILITIES

### Core Criteria

- ✓ An existing state-level leadership position is responsible for coordinating career advising efforts across education, workforce, and community systems and ensuring engagement beyond one system.
- ✓ All career advising roles are clearly defined and codified in state law or other statewide policy levers.
- ✓ Policy, guidance, standards, and competencies that define and align the expectations for common career advising positions that are funded or supported by the state at schools, institutions, or community organizations exist and are regularly reviewed.
- ✓ Sample job descriptions are available and accessible for all professionals engaged in career advising across governmental, institutional, and community roles.
- ✓ Asset maps at the state, regional, or institutional level clarify the roles and responsibilities of professionals who are providing and/or overseeing career advising.



## OVERALL RATING

1 ○ 2 ○ 3 ○ 4 ○

1—EMERGING		4—STRONG		RATING			
No state-level leadership positions are responsible for coordinating career advising efforts across education, workforce, and community systems.		The state has an effective leadership position responsible for coordinating career advising efforts across education, workforce, and community systems.		1 ○ 2 ○ 3 ○ 4 ○			
				EVIDENCE			
Career advising roles are not defined or codified in state law or other state-wide policy levers, and expectations for these roles vary widely across institutions and organizations.		All career advising roles are clearly defined and codified through state law or policy levers.		RATING			
				1 ○ 2 ○ 3 ○ 4 ○			
				EVIDENCE			
Policy, guidance, standards, and competencies are limited for common career advising positions that are funded or supported by the state.		Career advising roles are supported by robust policy, guidance, standards, and competencies that set aligned expectations across all common advising positions that are funded or supported by the state.		RATING			
				1 ○ 2 ○ 3 ○ 4 ○			
				EVIDENCE			
Job descriptions for advising roles, responsibilities, and expectations vary widely across local entities and are not aligned to career advising systems.		Sample job descriptions are readily available and accessible for all professionals providing career advising, clearly outline responsibilities and expectations, and are used consistently to align local practice with state goals and initiatives.		RATING			
				1 ○ 2 ○ 3 ○ 4 ○			
				EVIDENCE			
Asset maps are created locally and do not provide a clear picture of who delivers or oversees career advising.		Asset maps at the state, regional, and institutional levels provide clear documentation of the roles and responsibilities of all professionals and partners who are delivering or overseeing career advising.		RATING			
				1 ○ 2 ○ 3 ○ 4 ○			
				EVIDENCE			



## KEY ELEMENT 2: ESTABLISH STRUCTURES AND ROUTINES

### Core Criteria

- ✓ State guidance and templates for daily routines and practices (e.g., intake sessions, referral protocols, and documentation standards) are available and accessible across workforce and education systems.
- ✓ Statewide cross-functional team meetings or cross-agency meetings occur regularly to support connected career advising.
- ✓ Statewide infrastructure (e.g., career-related platforms, case management systems, coordinated calendars, shared data systems) is available and accessible across settings and provides information about learner outcomes, services provided, and career planning supports.
- ✓ Advising maps illustrate how K-12 pathways clearly connect to postsecondary opportunities and feed into workforce paths.
- ✓ Career advising tools that encourage universal vocabulary, a multiyear planning process, or shared frameworks exist across both education and workforce systems.
- ✓ State communication routines and guidance has consistent and coordinated messaging about communication strategies, storytelling structures, and learner experiences.



## OVERALL RATING

1—EMERGING	4—STRONG	
State guidance and templates for daily routines and practices may exist in isolation but are not widely shared or accessible across systems.	Clear state guidance and accessible templates outline daily routines and practices and are used consistently across systems.	<p><b>RATING</b></p> <p>1 ○ 2 ○ 3 ○ 4 ○</p> <p><b>EVIDENCE</b></p>
Statewide cross-functional or cross-agency meetings about connected career advising occur sporadically, if at all.	Cross-functional and cross-agency teams meet regularly to address priorities and align efforts to support connected career advising.	<p><b>RATING</b></p> <p>1 ○ 2 ○ 3 ○ 4 ○</p> <p><b>EVIDENCE</b></p>
Infrastructure such as career-related platforms, case management systems, coordinated calendars, or shared data systems is limited, and information on learner outcomes, services provided, and career planning supports is not integrated statewide.	Integrated career-related platforms, case management systems, coordinated calendars, or shared data systems are connected and used consistently, allowing stakeholders to access information about learner outcomes, services provided, and career planning supports.	<p><b>RATING</b></p> <p>1 ○ 2 ○ 3 ○ 4 ○</p> <p><b>EVIDENCE</b></p>
Advising maps are either absent or exist only at the local level.	Advising maps are available at both the state and local levels and clearly illustrate connections across K-12, postsecondary, and workforce opportunities and career pathways.	<p><b>RATING</b></p> <p>1 ○ 2 ○ 3 ○ 4 ○</p> <p><b>EVIDENCE</b></p>
There is little evidence of a common vocabulary, a planning process, or shared frameworks across education and workforce systems.	A universal vocabulary, a multiyear planning process, and shared frameworks are embedded across systems.	<p><b>RATING</b></p> <p>1 ○ 2 ○ 3 ○ 4 ○</p> <p><b>EVIDENCE</b></p>
There is limited routines or guidance about communication strategies, storytelling structures, or highlighting of learner experiences. Messaging is inconsistent across systems and often focused on compliance or basic program updates.	Clear communication routines and guidance ensure consistent, coordinated messaging about communication strategies, storytelling structures, or highlighting of learner experiences across education, workforce, and community systems.	<p><b>RATING</b></p> <p>1 ○ 2 ○ 3 ○ 4 ○</p> <p><b>EVIDENCE</b></p>



## KEY ELEMENT 3: PROVIDE COHESIVE PROFESSIONAL DEVELOPMENT

### Core Criteria

- ✓ Foundational statewide onboarding is required and used consistently to help new career advising professionals understand common roles across the state and basic counseling/advising techniques.
- ✓ State training reflects tiered supports for professionals who need minimal training versus specialized training.
- ✓ State guidance and/or supports exist for embedding career advising across all learner-facing roles and are shared during professional development.
- ✓ The state provides professional development, technical assistance, and/or supports on promising practices for group, cohort, and case management models versus 1:1 support models.
- ✓ The state provides tools, resources, and professional development to help career advising professionals remain current on labor market data, industry trends, and credentials of value.
- ✓ The state regularly organizes communities of practice, professional learning communities, and advising summits to connect career advising and education professionals across settings and elevate promising practices.



## OVERALL RATING

1 ○ 2 ○ 3 ○ 4 ○

1—EMERGING	4—STRONG	RATING
The state may provide limited training, but no comprehensive statewide foundational onboarding exists to provide new career advising professionals information on common roles across the state or basic counseling/advising techniques.	Foundational statewide onboarding is required and used consistently to provide new career advising professionals information on common roles across the state and basic counseling/advising techniques.	EVIDENCE
Differentiated training that reflects varying levels of responsibility is limited.	Training is differentiated to reflect tiered responsibilities, ranging from basic guidance roles to specialized advisors.	EVIDENCE
There is little state guidance and few supports on embedding career advising across learner-facing roles.	State guidance and/or supports explicitly embed career advising into all learner-facing roles and are shared during professional development.	EVIDENCE
There is little professional development or technical assistance and few supports on group, cohort, and case management models versus 1:1 support models.	The state provides consistent professional development, technical assistance, and/or supports on promising practices for group, cohort, and case management models versus 1:1 support models.	EVIDENCE
Access to labor market data, industry trends, or credentials of value is siloed.	Statewide tools, resources, and professional development on labor market data, industry trends, and credentials of value are available and practical across systems. Data literacy is fostered to help users understand these resources.	EVIDENCE
Advisors have few or no statewide opportunities to convene through communities of practice, professional learning communities, or advising summits.	Communities of practice, professional learning communities, and advising summits are regularly organized to connect professionals across settings and elevate promising practices.	EVIDENCE



## KEY ELEMENT 4: ENGAGE CRITICAL PARTNERS FOR COHERENCE AND CONNECTIVITY

### Core Criteria

- ✓ Statewide structures (e.g., P-20 and workforce councils, advisory committees, cross-agency workgroups) support or incentivize coordination.
- ✓ The state mandates interagency collaboration on career advising initiatives.
- ✓ Collaboration and alignment is supported by federal policy (e.g., state plans for Perkins V, the Workforce Innovation and Opportunity Act [WIOA], and the Every Student Succeeds Act [ESSA]).
- ✓ Intermediaries, employers, philanthropic partners, and community-based organizations play critical and consistent roles in cross-sector collaboration about career advising.
- ✓ Asset maps are available across settings and include information about learner outcomes, services provided, and career planning supports.
- ✓ Statewide communication resources help learners and leaders clearly understand the multiple partners and opportunities present in the education, workforce, and community systems that can help along their career journey.



## OVERALL RATING

1—EMERGING	4—STRONG	RATING
State-level structures to support coordination around career advising are minimal or newly forming. There may be isolated councils, committees, or workgroups, but their role in career advising is limited and not sustained.	The state has established and sustained robust statewide structures (e.g., P-20 and workforce councils, advisory committees, cross-agency workgroups) that actively coordinate and incentivize collaboration around career advising.	EVIDENCE
Mandates for interagency collaboration on career advising initiatives are weak or absent.	Agencies are mandated to work together on state career advising initiatives.	EVIDENCE
Collaboration and alignment across Perkins V, WIOA, and ESSA is inconsistent or siloed for state plans.	Policies and priorities for career advising are fully aligned across Perkins V, WIOA, and ESSA for state plans.	EVIDENCE
Intermediaries, employers, philanthropic partners, and community-based organizations may participate in discussions about connected career advising, but engagement is ad hoc rather than part of a coordinated statewide strategy.	Intermediaries, employers, philanthropic partners, and community-based organizations are intentionally engaged as strategic collaborators, ensuring that career advising efforts are coordinated, resourced, and continuously improved across secondary, postsecondary, and workforce systems.	EVIDENCE
There is no centralized approach to asset mapping. Information about learner outcomes, services provided, or career planning supports may exist in isolated agencies or regions, but it is fragmented and not easily accessible across settings.	Asset maps are shared across education, workforce, or community settings; clearly document learner outcomes, services provided, or career planning supports; and are regularly updated to reflect current resources.	EVIDENCE
Few resources are available to help learners or leaders understand the range of partners involved in career advising. Information about education, workforce, and community opportunities is scattered, hard to access, and often limited to program-specific websites or materials.	Clear, accessible, and regularly updated communication resources outline the multiple partners and opportunities engaged in supporting learners along their career journey. These resources show what supports are available, to whom they are available (e.g., eligibility requirements), and how to access them (e.g., in person, online, American Job Centers).	EVIDENCE



## PART 3: Plan Your Next Steps

This part helps you decide your next steps after you complete the Assessment Tool.

### Instructions

#### STEP 1

Record your summative score for each element.

#### STEP 2

Determine your areas of strength.




#### STEP 3

Determine your opportunities for growth.





#### STEP 4

Develop an action plan and next steps.

### SUMMATIVE SCORES

KEY ELEMENT	DEFINE ROLES AND RESPONSIBILITIES	ESTABLISH STRUCTURES AND ROUTINES	PROVIDE COHESIVE PROFESSIONAL DEVELOPMENT	ENGAGE CRITICAL PARTNERS FOR COHERENCE AND CONNECTIVITY
Summative Score for Each Element				



STRENGTHS AND OPPORTUNITIES				
KEY ELEMENT	DEFINE ROLES AND RESPONSIBILITIES	ESTABLISH STRUCTURES AND ROUTINES	PROVIDE COHESIVE PROFESSIONAL DEVELOPMENT	ENGAGE CRITICAL PARTNERS FOR COHERENCE AND CONNECTIVITY
Top Strengths				
Opportunities for Growth				



## Action Plan and Next Steps to Elevate Connected Career Advising

Drawing on reflections from throughout [Implementing Connected Career Advising: A Toolkit to Maximize Capacity and Coherence for Statewide Impact](#), you can complete the following worksheet to develop a connected career advising strategy for your state, district, institution, or organization:

- ✓ **Set goals.**
- ✓ **Revisit needed assets.**
- ✓ **Prioritize actions.**

### SET GOALS

What are your top three to five goals for advancing connected career advising? Or what would success look like if you had an effective strategy in place for ensuring that every learner receives high-quality, connected career advising?

1.

2.

3.

4.

5.



## REVISIT NEEDED ASSETS





What existing roles, routines, and partnerships can be clarified or better connected to strengthen capacity for connected career advising?




Where are there gaps in responsibilities, and what adjustments in roles, communication, or professional development would maximize impact for learners?



## PRIORITIZE ACTIONS

Drawing on the user personas, Role Mapping Tool, Assessment Tool, and other resources in this toolkit, identify one action per activity that will drive your strategy for elevating connected career advising and ensure that you accomplish the goals identified previously.

ACTIVITY	ACTION ITEM
 USER PERSONAS	
 COMMON TERMINOLOGY	
 ROLE MAPPING TOOL	
 ASSESSMENT TOOL	

ACTIVITY	ACTION ITEM
 DEFINE ROLES AND RESPONSIBILITIES	
 ESTABLISH STRUCTURES AND ROUTINES	
 PROVIDE COHESIVE PROFESSIONAL DEVELOPMENT	
 ENGAGE CRITICAL PARTNERS FOR COHERENCE AND CONNECTIVITY	

The ever-changing landscape poses challenges for state leaders, and they will have to continue to be agile throughout rollbacks of legislation, priorities, and funding. SSWG members suggested initial steps or actions state leaders can take to elevate connected career advising efforts, even in the face of funding cuts, hiring freezes, workforce reductions, and program eliminations. These steps are opportunities to pursue in existing systems rather than trying to add new roles or funding streams. Lasting change often begins with small actions.

## Initial Steps Leaders Can Take: A Starter List

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- Include [family](#) and [learner](#) voices in multiagency groups, advisory councils, standing committees, or convenings that involve career advising efforts.
- Integrate connected career advising efforts into state and local strategic plans.
- Create a state database of existing promising practices in connected career advising, and incorporate a sustainability plan to keep it updated.
- Revisit existing funding sources.
  - Create or provide a statewide database of preexisting grants or other public and private funding sources that could relate to career advising efforts.
  - Offer technical assistance or professional development to local leaders related to pursuing grant opportunities, writing grant proposals, and collaborating with partners to support similar work.
  - Provide guidance on [braided funding](#) at the program level and individual learner level to increase dedicated/restricted funds for career-related areas.
  - Add connected career advising strategies to current state, regional, or local grant proposals on related topics (e.g., career pathways, early college programs, workforce development initiatives, dropout prevention programs).

## Taking It Further: Form a Cross-Agency Working Group

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- Identify how career advising efforts align with governor-led initiatives or statewide education/workforce goals.
- Determine one area of focus related to connected career advising and message the need.
- Reach out to change makers, nonprofit organizations, private sector representatives, and philanthropic funders to move state initiatives forward.
- Draft a plan of action and possible outcomes.
- Determine ongoing communication about the issue and set timelines.
- Plan for turnover of representation and change management.
- Incorporate a deliverable with the following items: (a) challenges identified, (b) solutions suggested, and (c) recommendations.

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