

**CRITERIA: Area of Evaluation**

**A: Introduction**

Interview: asked important and relevant questions; reasonable time spent

Cover page: Confirmed ID; discussion of "self-discovery"

Table of Contents : When to use this report (to encourage future use)

4 Windows page: Explain

Explanation of Scales and Scores, including mid-range, introductory discussion of personality

**B: Personality**

Personality: Main factor, description, sought client confirmation

Personality: Sub-factors used to explain nuances of main factor; sought client confirmation

Personality: Career Implications (Client ID of the most important ones; any not apply)

Personality: Paragraphs (read paragraphs or had a discussion during the graph review to cover the same ideas); sought client confirmation

Strengths/Non-strengths: clear explanation, markings, summary, "homework"

Money Page Discussion

Critical Life Issues: appropriate discussion

**C: Interests**

Circle graph: good explanations of how the client's interests are distributed; good questions

Explanation of Vocation/Support/Lifestyle interest levels, with examples

Working through Interests appropriately

Appropriate review of Interest Summary Pages (Activity/Occupation/Subject)

Appropriate review of Lowest Interest Groups; red flags noted if applicable

**D: Skills**

Skills: appropriate review including any red flags within the Lowest Skills section

**E: Values**

Work Environment, Work Outcomes and Life Values Asked for further explanation of how client values them when needed/helpful

WE, WO and LV: Any others needed to be added (top 5?) Any thing low in Values that should be noted/pointed out/asked about?

**F: Interactive Action Plan**

Synthesis Process: Creating the Donut

Synthesis Process: Create a Funnel with client

Next Steps: O\*Net navigations

| <b>G: ICF Core Competency Standards</b>  |
|--|
| Cultivates trust & safety for the client |
| Maintains presence                       |
|  |
| Listens actively to client               |
| Evokes awareness - ask questions         |
| Facilitates client's growth              |

## Career Direct - Personal Consultation Rubric

| <b>Greatly Exceeds<br/>Expectations<br/>(Excellent)</b> | <b>Exceeds<br/>Expectations<br/>(Good)</b> | <b>Meets<br/>Expectations<br/>(Satisfactory)</b> | <b>Below<br/>Expectations<br/>(Fair)</b> | <b>Does Not<br/>Meet<br/>Expectations<br/>(Poor)</b> |
|---|--|--|--|--|
| <b>5 Points</b>   | <b>4 points</b>                            | <b>3 points</b>                                  | <b>2 points</b>                          | <b>1 point</b>                                       |
|   |  |  |  |  |
|   |  |  | 3  |  |
|   |  |  | 3  |  |
|   | 4  |  |  |  |
|   | 4  |  |  |  |
| 5   |  |  |  |  |
|   |  |  |  |  |
|   | 4  |  |  |  |
|   | 4  |  |  |  |
|   | 4  |  |  |  |
| 5   |  |  |  |  |
|   | 4  |  |  |  |
|   | 4  |  |  |  |
|   |  |  | 3  |  |
|   |  |  |  |  |

|  |  |   |   |  |
|--|--|---|---|--|
|  |  |   | 3 |  |
|  |  |   | 3 |  |
|  |  | 4 |   |  |
|  |  | 4 |   |  |
|  |  |   | 3 |  |
|  |  |   |   |  |
|  |  | 4 |   |  |
|  |  |   |   |  |
|  |  | 4 |   |  |
|  |  | 4 |   |  |
|  |  |   |   |  |
|  |  | 4 |   |  |
|  |  | 4 |   |  |
|  |  |   | 3 |  |

|   |  |   |  |  |
|---|--|---|--|--|
|   |  |   |  |  |
| 5 |  |   |  |  |
| 5 |  |   |  |  |
|   |  | 4 |  |  |
| 5 |  |   |  |  |
|   |  | 4 |  |  |

**Comments**

Six minutes long. Just a few questions vs. old way of having an in-depth conversation about history of jobs/classes, volunteer work, hobbies, etc. Closed ended question: "Are you actively involved in a church?"

No longer mentioning the part about not for mental or medical health?

I liked the way you involved the client in asking her about Detached being good or bad. Good examples of when this factor is valuable. I also liked you asking her about guessing her personality.

Good engagement with client plus good at bringing in complementary factors discussed earlier in the conversation.

Almost an hour to complete Personality section. Good dynamic and to the point conversation.

|  |
|--|
|  |
|  |
| I thought it was interesting that you did not spend any time discussing the details of each interest (i.e., activity, occupation, subject). Things moved way faster than I expected (or how I had been doing myself).  |
| This is where you covered the details but only at the high level to address gaps. I liked that this approach also saved a lot of time.   |
| About 16-17 minutes to this section. I found it very interesting to see how fast things moved along.   |
|  |
| Wow! Very quick review of skills. But it seems like the perfect level, especially from the perspective you explained that if you are good at things, then you do not need an explanation. About 4 minutes total.   |
|  |
| Good interaction with the client. I liked that you even went beyond 4 values to consider work environment to help with the selection.  |
|  |
| Good calibrating questions, especially to distinguish the break between 4 and 5. About 6-7 minutes for this section.   |
|  |
| I thought it was interesting that you let the client choose what to check especially when somethings were somewhat different than the conversation that took place during the review of the report. Other times I believe you were leading the client, but it was when you recognized the client was not as aware of what roles could represent. Also, the value of High Income was deprioritized by the client, but it seems like the tool still does not allow such adjustments (which could have been a good opportunity for improvement in the Interactive Action Plan to minimize confusion). |
| I got a little lost with how the funnel flowed using the IAP. I guess it is created per job rather than for multiple roles at the time. But this is not something you need to clarify for clients because they were not training on the concept of creating funnels like we old timers did. I think the clarification is more for us consultants who have never used this process.   |
| I know you mentioned O*Net, but I don't think you showed her how to navigate. I wonder if I missed that section of the video as I was typing these notes.  |

|   |
|---|
|   |
| This seems very natural for you, but it could also be because of the years of practice you have.  |
|   |
| As I mentioned previously, in some cases while creating the IAP you were leading the client. I think those were opportunities to educate the client, but maybe some clients may perceive that you were not listening and moving a little faster than they were processing. But for the review of the report, you did a great job! |
| Good questions asked throughout the process   |
| Laura was a good client. I think she will be able to run with the process and recreate the IAP every time she needs a refresh for future jobs.  |