

OCCUPATIONAL ANALYSIS QUESTIONNAIRE

OCCUPATIONAL PLANNING

Evaluation of where you are today
to take practical steps to reach
your goals for tomorrow



Client's Name: **Cynthia Dickson**

Email Address: **cdintheword@att.net**

Age: **61**

Gender: **Female**

Marital Status: **Married**

Address: **1001 The Long Run**

City: **Columbia**

State/Province/Region: **Tennessee**

Country: **US**

Postal Code: **38401**

Educational Level: **2 years college**

Occupational Type: **Accounting**

CAREER ANALYSIS QUESTIONNAIRE

1. List in chronological order all schools/university attended, beginning with high school

Name of School:

Colorado State University

City & Region:

Ft Collins, CO

Attended From:

1981-08-15

Attended To:

1982-05-21

Graduation Date:

Degree Earned (ex. High School Diploma or B.S. Psychology):

List your grades:

Name of School:

Pima Community College

City & Region:

Tucson, AZ

Attended From:

1988-08-20

Attended To:

1991-05-20

Graduation Date:

Degree Earned (ex. High School Diploma or B.S. Psychology):

List your grades:

2. What is your basic reason/motivation for doing the CareerDIRECT GE[®] assessment?

Clarify wiring for future work/ministry

3. Are you: Currently working full time Entering the workforce

Re-entering the workforce

Re-entering the workforce after time away, how long:

I plan to study, then enter the workforce Other

4. What is your current or most recent occupational field? (ex. banking, non-profit, education, mechanic, etc.)

Accounting

5. What are (were) your job responsibilities?

General Ledger posting and review, Accounts Payable, Accounts Receivable, Budget Forecast, Medical Claims Processing

6. How did you get this job?

Referred by a friend

7. Why did you choose this occupation?

I like working with numbers and math

8. Please indicate on the following scale the level of your satisfaction at your current job.



9. What do (did) you like best about your job?

Environment and some of the people

10. What do (did) you like least about your job?

Having to keep track of too many very different things and no efficient systems in place

11. How would your employer evaluate your job performance?

90 day review was good, fired at 6 months

12. How would your fellow workers evaluate it?

No one really knew what I did and there was no backup

13. Do you have any additional jobs? (Briefly describe)

Not a paid position, but Financial Coaching and starting a Bookkeeping business

14. Please list jobs or functions you performed in previous occupations at which you excelled.

Creating systems and then maintaining accuracy, also problem solving. I like things that are the same but different for example, rules for reconciling an account are the same and each has different activity.

15. If you could plan and develop your career over again, what would you do differently? Why?

I learn how to do my job very well and can also train others so that I can move to something new. At least three times now, I became a key person without any backup or person to crosstrain and I had no work/life balance. Management did not make any changes when I requested assistance, and had to hire multiple people when I left due to burnout. That is a painful process I would prefer not to repeat.

16. What are your plans for the next five to ten years regarding your career?

The current plan is to transition into a season of more coaching and ministry and less employer work.

17. If you are married, how does your spouse feel about your situation? What is his or her counsel?

We are aligned. What our future looks like has been a multiyear ongoing discussion. We are continuing to gather information and investigate financial opportunities for our future. Losing my job less than two weeks ago was unexpected and we are evaluating options.

18. Are you willing and able to relocate for the "right" opportunity?

Not currently

19. Which of the following will affect your career decisions? Proximity to family

Access to education/training

Current financial condition

Effect on children

Other (briefly explain):

20. How would you describe your spiritual life?

My relationship with God is important to me and I actively engage in prayer, self-reflection, and community for growth

21. Are there any underlying, non-career issues that are causing you concern at this time?

Working with a holistic health care provider to improve my current and future health

22. How would such issues affect a career change or occupation decision?

Other than less stress, it shouldn't. If anything, improved health should allow me to be more active and productive

23. How is your overall financial situation (i.e., gaining, just making ends meet, falling behind, or in debt and going under)? How much of your desire for a change in occupation is motivated by a desire to increase your income?

We are basically debt free except the mortgage and we do have savings. We truly want to feel led by the Spirit for our next steps and so are investigating options and seeking wise counsel.

24. What are your strongest talents? (Briefly explain)

Solving puzzles, being able to break something up into pieces and see the different ways it can be put together. I can see both details and a big picture which allows me to implement a vision. I am invested in the quality of my work.

25. What are your weak areas? (Briefly explain)

I can be paralyzed with indecision if two items/issues are assessed as equal in my mind. I do not enjoy calling someone if I do not feel competent that I am prepared for questions they may ask.

26. What would be the criteria for your ideal job situation (i.e., what are the key elements you are looking for in a job)?

Environment is a huge factor for me. Conflict and emotional undercurrents drain me. The actual work to be done and that I am not the only person to do it..

27. What job did you dream about when you were a child?

I think an astrologist as the stars fascinated me

28. What are your hobbies? What do you prefer doing in your free time?

Traveling, reading, puzzles

29. What have you done or are you doing to prepare for a future occupation or career?

Processing through the emotional baggage from the stress I was under at my last position as well as being "seperated" from employment

30. Would you need additional schooling/training to prepare you for your ideal situation?

No

31. To meet your ideal career situation would you be willing to continue your education whether traditionally (college/tech school) or informally (certificate, etc.)?

Yes

32. Who are the primary persons with whom you discuss job, career, and schooling issues?

Husband and close friends

