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

Additional comment:

Maybe I'm nitpicking, but I point this out when teaching people how to prepare for an online job interview, that if they have a poor background, are conducting the interview in the kitchen, in the bedroom where you can see the bed, etc., they should blur or set up some kind of background. For me, it's a matter of professionalism.

I cannot extend the lenght of the row 32, so in case you have any problems with reading it - here is the link to Google Sheet where I have created this rubric: https://docs.google.com/spreadsheets/d/1efXwc5V_bXE-hIgUZm-4jdCmrJAJ3xHdIDwqlHzOzjc/edit?usp=sharing

Career Direct - Personal Consultation Rubric

Greatly Exceeds Expectations (Excellent) 5 Points	Exceeds Expectations (Good) 4 points	Meets Expectations (Satisfactory) 3 points	Below Expectations (Fair) 2 points	Does Not Meet Expectations (Poor) 1 point
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Comments
+ Very good, relevant and probing questions,. + Resonable time (6 min). + Included prayer.
+ Asked client to read some texts from the beggining, starting with emphasizing the essence of self-discovery. + Explained the difference between personality and character. - Did not confirm ID.
+ Explained how the report/results can help her to make significant decisions in the future. + Discussed the meeting roadmap and timeline. + Mentioned the need for additional work on the part of the client and why it is important.
+ Mentioned the need of 4/4 fit, why it is importnat and gave a good example. + Exlained the difference between the natural skills and abilities. + Emphasized the importance of Values. + Referred to the customer's experience with school grades.
- The full scale was not explained in details; mostly the mid-range. Information on the distribution of the Personality results and the meaning of particular numbers and percentages was missing. + Good question on the strongest trait - is it good or bad, explanation that that there is no good/bad and gave an exaple in context. + Asked the client to guess what her strongest personality traits are.
+ Explained main Personality factor and asked related questions. + Sought client's confirmation. - Nothing was marked or annotated on the report on screen, which is helpful for both the client and the consultant and makes it more engaging. In addition, doing this on a printed report and then scanning it, as mentioned, creates much more work for the consultant.
The question posed was both probing and well thought-through, and the client's confirmation was obtained.

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+ Good discussion, probing questions and sharing examples from the consultant's own life help to build rapport and trust.
- I would ask the client to read some of the paragraphs, as this is a more engaging and helps them to remember.

+ Good discussion and asking the client for feedback on whether she agrees with the strengths and non-strengths.
I would emphasize that it is worth strengthening our strengths and that a given non-strenght will never become a strength, even if we work hard on it (which stuck in my mind from the YES! training ;-)).
I would also add Personality summary at the end of this section.

Good advice on using strenghts/non-strenghts list from the report on job interviews.

"+ Good questions were asked, for example about how the client is relaxed (not stressed) despite having a high debt and not managing their money very well.
+ Plus for stepping an extra mile for willinges to share some extra financial management materials.

+ Interests and their distribution very well explied, good questions asked.
+ Adressing potential red flag/question on why there is 0% in Doing area.

Good explaination on what are voactional/supporting/lifestyle interests and provided good example related to client's TOP area of interests.

Everything was fine and as it was in the Personality section the consultant related to her own life and her distribution of interests, which built rapport and trust.

Reassured that everything had been covered and discussed.

There were no red flags.

It was to short for me.
- Since the client does not indicate which Skills are natural and which are acquired when completing the assessment, I would ask about this when presenting the list of skills from the report.
- I would also briefly refer to how the Skills relate to Personality and Interests.

+ A good explanation of how values may change over time or in light of life circumstances.
+ I liked how the consultant delved into the flexible hours and equality aspects of EW, viewing them as important and wanting to include them in the synthesis.
+ Connected some Values with Personality.
- There was a long comment and question about high income in the WO section, and the consultant should have waited for the client's response before commenting and asking about continuing education. It was too much to process at once (two questions in one). It also sounded to me like an attempt to influence the client to move high income lower on the list. I would also ask the client what high income means to her, rather than only explaining what it means from the Career Direct perspective.

Everything was fine, and all the technicalities were explained clearly.

requires consistency, follow-up, and meeting specific financial goals, she would likely need substantial support from others - such as an operations or project management partner - to stay on track. Even if she is self-aware and intends to hire people to handle the structured, detail-oriented parts of the work, this does not in itself justify marking this trait as a good fit for the role.

2) Being Introverted (13)
Although not extreme, this score leans clearly toward introversion. The Fundraising Director role typically calls for someone energized by people interactions - attending events, networking, and cultivating donor relationships in social settings. While Laura may perform well in one-on-one conversations and build meaningful connections with individual donors, the ongoing external engagement and public presence required in this position could be draining for her. Awareness of this tendency can help her manage energy, but overall, I would not consider this a natural fit either.

3) Being Compassionate (13) with subtraits
Laura's Compassionate nature is one of her greatest assets for working in the non-profit sector - she is empathetic, caring, and skilled at building trust. However, in fundraising, frequent rejection and the pressure to reach financial targets can take an emotional toll on someone with this sensitivity. Over time, this could become discouraging or exhausting. Her compassion would serve her well in nurturing relationships and stewardship roles, but she might struggle in high-pressure, target-driven environments unless she has strong emotional resilience and team support. I would mark this trait as a good fit, but I would clearly emphasize to the client that this strength has two sides and that she needs to be fully aware of how it might affect her in a role that involves constant feedback, rejection, and performance expectations.

I think that she has some other traits and subtraits that can support these three above points:
Dominant (16) + Assertive (15)
This combination brings confidence, initiative, and the ability to influence others. It helps balance Laura's Unstructured and highly Compassionate tendencies by giving her a natural drive to take charge, make decisions, and maintain direction even when emotions are high (and she has low level of stress). Her assertiveness allows

From the conversation, it seemed that the consultant had shown the client earlier how O*Net works; that part was not included in the recording.