

10 ESSENTIAL QUESTIONS TO STRUCTURE YOUR ASSESSMENT APPROACH



1. **What's the purpose?** One of Covey's seven principles is "[begin with the end in mind](#)." Knowing your purpose for assessment will guide the entire process.
2. **Who's the client?** Although the individual being assessed may seem like the obvious answer, who requested the assessment? Who is paying the bill? The assessment process will be impacted by mandates, 3rd party expectations, and other external influences.
3. **Where will assessment occur?** Location impacts the results of assessment, whether in subtle or obvious ways. With assessment goals in mind, be strategic about where to assess – choices may include your office, a boardroom, or on-the-job, and will be influenced by your desire for limited distraction, real world authentic activities, security and supervision, or the client's need for accommodation.
4. **Who owns the results?** And related to this: How will these results be used? Before embarking on the assessment process or administering any assessment tools, you'll need informed consent from the individual you are assessing. Truly informed consent requires clear answers to these two questions.
5. **What's the underlying need?** Sometimes assessment requests are superficial or misguided. In the [4 stages of learning model](#), the first stage is unconscious incompetence (i.e., we don't know what we don't know) – it's not uncommon to be asked to conduct specific assessments that you know won't achieve the clients' goals. Dig deeper to find the underlying concerns that will help you select appropriate tools.
6. **What tools can /may I use?** Consider mandate, budget, timeline, availability, qualifications, training, and available supervision.
7. **What's the most effective approach?** Make informed decisions about assessment tools and process. With a clear assessment goal in mind, consider all your options. Also consider appropriateness of various approaches in terms of your client's culture, competency, and comfort. See [10 Tips for Selecting Assessment Tools](#) for additional support.
8. **How do I make sense of results?** "Assessment" is much more than administering tests. Your role is to integrate and interpret information from a variety of sources, identifying themes, patterns, inconsistencies, and contradictions.
9. **When is assessment "done"?** There are thousands of assessment tools and processes. Your role is to develop an efficient, cost-effective strategy to gather credible information on which to base significant recommendations or decisions. Too much assessment is wasteful; however, too little may be irresponsible.
10. **How do I communicate results?** As with all communication, effective assessment reports, whether written or verbal, are targeted to the audience. Communication may be as simple as point form notes in a shared database or an [informal conversation with a client](#). Sometimes, however, a comprehensive assessment report is required. Before writing, revisit Step 1. Review your purpose . . . structure assessment results to clearly respond to the assessment question(s).

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