

The Merrill Counseling Series

8TH EDITION

ASSESSMENT PROCEDURES
for Counselors and Helping Professionals

ROBERT J. DRUMMOND CARL J. SHEPERIS KARYN D. JONES



EIGHTH EDITION

**ASSESSMENT PROCEDURES
FOR COUNSELORS AND
HELPING PROFESSIONALS**

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EIGHTH EDITION

ASSESSMENT PROCEDURES FOR COUNSELORS AND HELPING PROFESSIONALS

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*The eighth edition is dedicated to my children who bring light to my world:
Ellis, Jake, Joe Lee, Emily, and Laura Beth*

—CJS

PREFACE

In *Assessment Procedures for Counselors and Helping Professionals*, our goal is to help current and future school counselors, marriage and family therapists, mental health counselors, career counselors, and other helping professionals become better consumers of the various methods and procedures used in the process of assessment. Assessment occurs in many settings, such as schools, mental health clinics, career counseling centers, substance abuse treatment centers, private practice, psychiatric hospitals, and vocational rehabilitation centers. Assessment is an integral part of the counseling process in which the counselor and client work together to gain a better understanding of the client's problems. We believe that effectiveness and accuracy in assessment are essential to effective counseling. Throughout the text, we stress that assessment is more than simply giving tests. Assessment involves collecting and integrating information about an individual from *multiple methods* and *multiple sources*. Throughout this textbook, our aim is to provide students with an overview of the many approaches to assessment so they can become competent and ethical practitioners in our multicultural society.

This textbook has three goals. The first goal is to supply foundational information about assessment, which includes an overview of the various methods and sources of assessment information. In addition, students must learn some basic principles of measurement in order to understand the applications and issues in assessment. Thus, we also provide foundational information about statistical concepts, test scores, and the psychometric aspects of assessment (e.g., validity and reliability). The second goal of this textbook is to present an overview of the general areas in which assessment is commonly utilized, such as in assessing intellectual ability, achievement, aptitude, career interests and skills, and personality. The third goal is to provide students with information about specific assessment applications and issues, such as clinical assessment, communicating assessment results, assessment with diverse populations, and ethical and legal issues.

To meet these goals, the textbook is divided into three parts that provide a balance of theory and practice information as well as coverage of the assessment instruments and strategies commonly used in school counseling, clinical mental health counseling, and vocational or career counseling settings. These sections include Principles and Foundations of Assessment, Overview of Assessment Areas, and Applications and Issues.

PRINCIPLES AND FOUNDATIONS OF ASSESSMENT

Part One of this textbook, Principles and Foundations of Psychological and Educational Assessment, focuses on the underlying principles and foundations of all forms of psychological and educational assessment. We designed this section to provide counselors with the essential concepts of measurement and evaluation that they need to engage in the assessment process. Chapter 1 introduces assessment and provides historical information that has influenced assessment practice. Chapter 2 focuses on the assessment process, emphasizing the importance of collecting data by using multiple methods from multiple sources. The chapter provides detailed information about

formal and informal data-collection methods (e.g., interviews, tests, observations) as well as the sources of assessment information (e.g., the client, parents, significant others, teachers, health professionals). Chapter 3 presents basic statistical concepts associated with tests and assessment. Chapter 4 presents information about types of scores and standards for scoring and interpreting assessment instruments. Chapters 5 and 6 supply information about the key psychometric considerations that are essential in assessment: reliability and validity. Chapter 7 integrates the elements of the assessment process by presenting information about selecting, administering, scoring, and reporting assessment results.

ASSESSMENT AREAS

Part Two of the textbook, *Overview of Assessment Areas*, builds on the *Principles and Foundations* section by exploring specific assessment areas. Chapter 8 supplies information about assessing intellectual ability, including the major theories of intelligence, the major tests of intelligence (e.g., the Wechsler scales, the Stanford–Binet, the Kaufman tests), and special issues in intelligence testing. Chapter 9 covers assessment of achievement, including achievement test batteries, individual achievement tests, diagnostic achievement tests, subject-area tests, and other types of achievement tests. Chapter 10 presents information about aptitude assessment. Extensive changes in U.S. social and economic conditions may result in more counselors working with clients on career-related issues; thus, Chapter 11 provides important information about career and employment assessment. The last chapter in this section, Chapter 12, focuses on personality assessment and the many types of personality instruments and techniques.

APPLICATIONS AND ISSUES

The chapters in Part Three, *Applications and Issues Related to Assessment*, center on the applications and issues related to specific assessment areas. The main focus is the effective, competent, and ethical application of assessment methods in various settings and with diverse populations. For example, a primary purpose of assessment is for diagnosing client issues and problems. Thus, Chapter 13 focuses exclusively on clinical assessment and the use of assessment procedures to diagnose mental disorders, develop treatment plans, monitor counseling progress, and evaluate outcome. Chapter 14 presents information about assessment issues in education, such as the assessment activities of school counselors, the types of assessment instruments used in schools, assessing specific learning disabilities and giftedness, test preparation and performance, environmental assessment in the schools, and assessment competencies for school counselors. Because assessment strategies are applied to diverse populations, Chapter 15 supplies important information about multicultural assessment, including social and cultural factors related to assessing individuals, groups, and specific populations, as well as the competencies and standards required for assessing individuals from diverse backgrounds. Chapter 16 presents information about communicating assessment results. Finally, Chapter 17 focuses on the important ethical and legal issues related to assessment.

CHANGES IN THE EIGHTH EDITION

First published in 1988, this textbook has become a classic among assessment textbooks designed specifically for counselors. The eighth edition hosts extensive changes in the content of the text; we have updated all of the chapters and strived to provide the most accurate, up-to-date assessment information. At the same time, we have endeavored to maintain the original appeal of the text by retaining an easy-to-read format and continuing to emphasize assessment information that is most useful and relevant for school counselors, marriage and family therapists, mental health counselors, and other helping professionals. Throughout the text, we provide information and examples about widely used assessment instruments in order to help students become familiar with these well-known tests. This edition has been completely revised to align with the 2014 standards for educational and psychological testing.

Key revisions in this edition include the following:

- Chapter 1, Introduction to Assessment, consists of revised and expanded information about assessment in counseling. This introductory chapter provides an overview of the purpose for assessment as well as new information about the assessment process.
- Chapter 2, Methods and Sources of Assessment Information, has been revised to describe current information about the multiple methods and sources of data collection used in the assessment process. This chapter encompasses information about formal and informal assessment instruments and strategies divided into three broad categories: interviews, tests, and observation. Information about the importance of using collateral sources in assessment is also presented.
- The chapters on statistical concepts, understanding scores, and reliability and validity (Chapters 3, 4, 5, and 6) have been extensively reorganized and revised. Chapter 5 provides expanded information on sources of measurement error.
- Chapter 7 summarizes the assessment process by focusing on the procedures for selecting, administering, scoring, and interpreting assessment results. It includes information about the steps involved in selecting appropriate assessment instruments and strategies; the various sources of information about instruments; the process of evaluating assessment instruments; and procedures for administration, scoring, and interpretation.
- We have updated and improved all of the chapters in Part Two, Overview of Assessment Areas, to include the most current information about specific assessment strategies and instruments. All chapters in this section (Chapters 8 through 12) supply up-to-date information about the most widely used instruments and strategies. For example, Chapter 8, Assessment of Intelligence and General Ability, includes information about the latest revisions of key intelligence tests as well as expanded information on the contemporary and emerging theories of intelligence.
- Chapter 13, Clinical Assessment, has been restructured to include a broad presentation of the *Diagnostic and Statistical Manual of Mental Disorders, Fifth Edition (DSM-5)* and its use in clinical assessment. In addition, we have added new information about the mental status exam, suicide risk assessment, and behavioral observation used in clinical assessment.
- We have updated Chapter 14, Assessment in Education, including updated information about school assessment programs. We have also added specific information about the common assessment activities performed by school counselors and updated

information about conducting needs assessments, assessing specific learning disabilities, assessing giftedness, and environmental assessment in the schools.

- Chapter 15, *Assessment Issues with Diverse Populations*, has been extensively revised. We expanded the discussion of measurement bias to align with the concept of fairness in testing, as described in the 2014 edition of the *Standards for Educational and Psychological Testing*. We restructured the section on assessing individuals with disabilities to encompass assessment of individuals with visual impairment, hearing impairment, intellectual disability, and other disabilities.
- Chapter 16, *Communicating Assessment Results*, has also been extensively revised. Because counselors often orally communicate assessment results to clients, parents, and other professionals, we expanded the section on the use of feedback sessions to report results. Furthermore, we updated and improved the information provided about written assessment reports.
- In Chapter 17, *Ethical and Legal Issues in Assessment*, we have updated the overview of ethical codes from professional organizations relevant to assessment. We also have updated and expanded the section on statutes and regulations that have implications for assessment.

ACKNOWLEDGMENTS

I would like to thank my publisher, Kevin Davis, for believing in me and giving me the chance to revise such an esteemed book. This book influenced me during my graduate training, and now I have the privilege to revise it for the eighth edition. Thanks to the late Robert Drummond for his many contributions to the assessment world and for authoring such a foundational textbook. I would also like to thank Melinda Rankin for her excellent copyediting skills. She has an amazing eye for detail and a gentle way of helping me to see my own writing errors. Finally, I would like to thank the following colleagues, whose reviews improved this edition: Donald Deering, Oakland University and University of Phoenix; Josué R. Gonzalez, Clinical Psychologist—San Antonio, Texas; Dawn C. Lorenz, Penn State University; Diane Kelly-Riley, Washington State University; and Anthony Tasso, Farleigh Dickinson University.

CJS

ABOUT THE AUTHORS

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Dr. Robert Drummond passed away on March 14, 2005. He was a retired professor and counselor educator at the University of North Florida for 20 years. He was foremost in the field of assessment, and he specialized in educational and psychological testing, career development, models for evaluation, educational research, and personality theory and measurement. Dr. Drummond wrote the first edition of this text in 1988. Now in its eighth edition, the book remains a popular assessment textbook in counseling.

Carl J. Sheperis

Dr. Carl J. Sheperis serves as Chair of the Department of Counseling and Special Populations at Lamar University. He is a past president of the Association for Assessment and Research in Counseling, associate editor for quantitative research for the *Journal of Counseling and Development*, and a director for the National Board for Certified Counselors. He has worked with the American Counseling Association as the chair of the Research & Knowledge Committee and has served as the editor of the *Journal of Counseling Research and Practice*.

In addition to this textbook, Dr. Sheperis is an author of *Research in Counseling: Quantitative, Qualitative, and Mixed Methods*; *Clinical Mental Health Counseling: Fundamentals of Applied Practice*; *DSM Disorders in Children and Adolescents*; and *The Peace Train*. He is also published in various textbooks, academic journals, and reference volumes. A frequent speaker and presenter at professional conferences and workshops as well, Carl Sheperis has appeared at such recent events as the American Counseling Association World Conference, The International Autism Conference, the Association for Counselor Education and Supervision Conference, the National Assessment Conference, and the National Head Start Conference.

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Dr. Karyn Dayle Jones is an associate professor in counselor education at the University of Central Florida. She has over 20 years of experience in the counseling profession and has been a counselor educator for over 15 years. Jones is coauthor of *Introduction to the Profession of Counseling*, has authored or coauthored several book chapters and refereed publications, and has made numerous professional presentations. Her primary areas of research are assessment and diagnosis. She is the past president of the Association for Humanistic Counseling, a division of the American Counseling Association. Jones is a Florida Licensed Mental Health Counselor and a National Certified Counselor, and she has worked as a counselor in mental health agencies, schools, and private practice.

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Introduction to Assessment

Imagine being asked by a child welfare agency to conduct an assessment that would determine a child's potential for transitioning from foster care status to adoption within a family. As part of the assessment, you might visit the home of the potential parents to determine the appropriateness of the environment and to have a realistic sense of the family functioning. You would also have to evaluate the social and emotional development of the child and the readiness for adoption. For example, it would be necessary to consider the child's ability to bond with a new family, any developmental issues that may be present, and any potential barriers that might impact the success of the adoption process. In order to gather enough information to make this type of determination, you might interview the parents, observe the child playing and interacting, and conduct evaluation using standardized assessment instruments (e.g., the Bayley Scales of Infant and Toddler Development). Consider how important this assessment process would be to the children and the parents. The overall assessment process would be quite involved, and the results would have incredibly high stakes. The final assessment report would include information about any developmental concerns, an evaluation of the family environment, an interpretation of standardized scores, and a final recommendation based on the data. Based on the assessment results, the child welfare agency would make a decision about finalizing the adoption.

It is a privilege to play such a role in people's lives, and the privilege should be honored with careful attention to best practices and a wealth of knowledge about the assessment process. Although the results of assessment do not always lead to happy outcomes, this example provides some insight into where your journey through this book will lead. Assessment has long been regarded as a fundamental component of all helping professions and the cornerstone of the counseling process. Simply put, assessment is the process of gathering information about a client and determining the meaning of that information. It is through assessment that counselors can uncover the nature of a client's problems or issues; the magnitude of these problems and how they are impacting the client's life; how the client's family, relationships, or past experiences are affecting the current problem; the client's strengths and readiness for counseling; and whether counseling can be beneficial to the client. Assessment is also critical for establishing the goals and objectives of counseling and for determining the most effective interventions. Assessment occurs in all counseling settings, including schools, mental health clinics, career counseling centers, substance abuse treatment centers, private practice, psychiatric hospitals, and vocational rehabilitation centers. In practice, counselors are *always* assessing. Assessment is an ongoing, fluid, and dynamic process that continues throughout the course of the helping relationship.

Although students in the helping professions often initially question the need for assessment training, competency in assessment is integral to successful counseling practice (Whiston, 2012).

The purpose of this textbook is to help current and future school counselors, mental health counselors, career counselors, marriage and family therapists, and other helping professionals recognize the integral role between assessment and counseling, understand the process of assessment, develop an awareness of the applications of assessment, and understand the legal and ethical issues specific to assessment. We believe that competency in assessment is essential to positive outcomes in counseling. In order to be competent in assessment, you will need to seek supervised practice opportunities in addition to learning the content in this textbook. Each chapter in this book will help you build upon your ability to integrate assessment into your practice as a professional counselor.

Throughout the textbook, we use the term *assessment* rather than *testing*. It is important to understand that testing is just one component of the assessment process and that the scope of assessment activities is far beyond the exclusive use of standardized tests. Although we will present information about important and widely used educational and psychological tests throughout the text, we stress that assessment is more than simply giving tests. Assessment involves collecting and integrating information about an individual from *multiple methods* (e.g., interviews, observations, tests) and *multiple sources* (e.g., the client, family members, teachers, physicians). Corroborating data from multiple assessment methods and sources helps create a more comprehensive and accurate understanding of the client and his or her presenting concerns.

After studying this chapter, you should be able to:

- Define *assessment*.
- Describe the various purposes of assessment.
- Describe the broad categories of data collection methods and the various sources of assessment information.
- Explain the importance of integrating multiple methods and multiple sources of assessment information.
- List and describe the steps in the assessment process.
- Describe the competencies required by counselors for the effective use of assessment instruments.
- Describe the historical context of assessment.
- Describe the application of computer technology in the field of assessment.

WHAT IS ASSESSMENT?

Before we can talk about the assessment process, it is important to understand our definition of assessment. The term *assessment* refers to any systematic procedure for collecting information that is used to make inferences or decisions about the characteristics of a person (American Educational Research Association (AERA), American Psychological Association (APA), & National Council on Measurement in Education (NCME), 2014). Assessment encompasses a broad array of data collection methods from multiple sources

to yield relevant, accurate, and reliable information about an individual. In counseling and other helping professions, assessment is considered a *process*, because it is the *continual practice* of gathering information. Some hold to a traditional (yet erroneous) belief that assessment is limited to the first meeting with an individual; in reality, assessment is an ongoing process that may begin even before the first face-to-face contact with the individual and that continues throughout the course of the helping relationship.

Many disciplines employ the activity of assessment, including psychology, counseling, education, social work, health, military, and business and industry. Educators and other school personnel use assessment to identify learning or behavioral or emotional problems in students and to determine appropriate interventions and educational plans. Psychologists and other mental health professionals utilize assessment to help in diagnosing mental disorders, treatment planning, and monitoring and evaluating treatment progress. Career counselors engage in assessment to evaluate individuals' vocational interests and aptitudes. Because numerous types of professionals engage in assessment, we will refer to those individuals as *counselors*, *test users*, *assessors*, *examiners*, or simply *professionals* throughout the textbook. Similarly, we will refer to individuals who participate in the assessment process as *clients*, *test takers*, *assesseees*, or *examinees*.

Assessment is often equated with *testing*, and the two terms are often confused or erroneously used interchangeably. Even today, many published textbooks hardly distinguish between assessment and testing. As Cohen, Swerdlik, and Sturman (2012) noted, *testing* has been a catch-all phrase for the entire testing process rather than just the administration of a test. However, assessment goes beyond merely giving tests. It is a comprehensive process that involves the integration of information from multiple data collection methods (e.g., interviews, tests, observations). Therefore, tests are now considered to be one aspect of the overall assessment process (American Educational Research Association (AERA) et al., 2014). The fact that assessment can proceed effectively without testing helps to distinguish between these two activities (Weiner, 2013).

The methods for collecting assessment information can be grouped into three broad categories: interviews, tests, and observations. Each category comprises a wide array of formal and informal instruments and strategies, such as unstructured interviews, rating scales, standardized tests, projective drawings, checklists, questionnaires, and so on. Assessment also involves obtaining information from various sources, which may include the client, family members, spouses or partners, teachers, physicians, mental health professionals, and other professionals. The assessment process varies from assessment to assessment, depending upon the purpose for assessment, the setting in which the assessment takes place, the needs of the client, and the availability and utility of the methods and sources of information (Weiner, 2013). We emphasize the importance of using multiple methods in most assessments, because the results of a single assessment instrument should never be the sole determinant of important decisions about clients.

The Purposes of Assessment

Now that we have defined assessment, it is important to explore the rationale for conducting assessment in counseling and other helping professions. Why do counselors assess? The short answer to this question is to gather information about a client. However, the information that counselors need to collect about a client depends a great deal on the *purpose or reason for assessment*. The research literature contains at least four general

purposes of assessment, including screening, identification and diagnosis, intervention planning, and progress and outcome evaluation (Erford, 2012; Sattler & Hoge, 2006; Selborn, Marion, & Bagby, 2013).

SCREENING *Screening* is a quick process, usually involving a single procedure or instrument, used to determine whether an individual has a high risk of having a specific problem and needs more in-depth assessment at that time. The screening process is not comprehensive, and the instruments used for screening are often held to lower standards of psychometrical soundness (Erford, 2012). Screening does not necessarily detect a specific problem or disorder an individual might have or how serious it might be; rather, it provides counselors with preliminary information that identifies those individuals with a high probability of having a particular problem. If an individual is identified as having a high risk for a disorder through the screening process, then further assessment is warranted. For example, many colleges have depression screening days in which students are given the opportunity to complete a questionnaire or instrument that detects a risk for depression. If the results of the instrument indicate a high risk for depression, then the student is referred to the counseling center for further evaluation and, if needed, counseling.

IDENTIFICATION AND DIAGNOSIS In counseling, assessment is often conducted as a means of *identifying* or *diagnosing* problems, symptoms, or disorders. *Diagnosis* can be defined as a “detailed analysis of an individual’s strengths and weaknesses, with the general goal of arriving at a classification decision” (Erford, 2006, p. 2). The assessment process for diagnosis typically encompasses the use of a series of instruments and strategies to identify a client’s problem areas that need to be targeted for intervention. Many counselors are required to diagnose individuals using a classification system called the *Diagnostic and Statistical Manual of Mental Disorders, Fifth Edition*, (DSM-5; American Psychiatric Association (APA), 2013). *Mental disorders* are behavioral or psychological patterns that impair an individual’s cognitive, emotional, or behavioral functioning. In mental health counseling settings, depression and anxiety are examples of problems commonly diagnosed using the DSM-5. In school settings, identifying students who may be experiencing delays or learning problems is an important objective of assessment.

INTERVENTION PLANNING *Intervention planning* (i.e., treatment planning) involves deciding on a course of action that facilitates client change and helps improve the client’s outcome. In most cases, an individual is referred for counseling because he or she is struggling and needs specific psychological, educational, or behavioral interventions to improve his or her situation (Lichtenberger, Mather, Kaufman, & Kaufman, 2005). In these cases, the purpose of assessment is to gather information to determine the most effective interventions that address and resolve the client’s specific areas of concern. There are innumerable interventions that a counselor can choose from, and the interventions decided upon are based on the client’s problems and the reason for referral. In addition, the setting in which the assessment takes place (such as a school, hospital, community mental health agency, private practice, or vocational center) will influence the types of interventions recommended (Lichtenberger et al., 2005).

PROGRESS AND OUTCOME EVALUATION Once interventions have been implemented, counselors may use various assessment instruments and strategies to monitor a client’s progress and evaluate outcome. By periodically monitoring a client’s progress, counselors can

determine if the interventions are positively impacting the client. If an intervention is having no positive effects, then counselors may reevaluate the client and make new intervention plans. When an intervention program is completed, counselors may conduct an outcome evaluation to determine if the particular intervention was effective and if the client achieved his or her goals at the end of counseling. The first step in *progress and outcome evaluation* is establishing a *baseline measure* of the client's condition. This usually takes place during the initial meeting for assessment and can involve the use of formal or informal assessment instruments or strategies. For example, an informal method would be to ask the client to rate his or her feelings of depression on a scale from 0 to 10, with 0 indicating a complete absence of depressive symptoms and 10 indicating feeling intensely depressed. An example of a formal assessment instrument designed specifically for progress and outcome evaluation is the Outcome Questionnaire (OQ-45), which measures adult clients' psychological symptoms (e.g., depression, anxiety), interpersonal functioning, and social role functioning. The assessment methods used to collect baseline data are periodically readministered to monitor the client's progress over the course of intervention. To assess the outcome of the intervention, the same instruments are also administered after the client has completed the intervention. Results from the outcome assessment are analyzed to determine if there has been a change from the baseline score.

Multiple Methods and Multiple Sources

You are likely beginning to see that assessment is a complex but essential process. Counselors using best practices conduct assessment by using multiple methods and multiple sources. Imagine having a complex jigsaw puzzle that you need to put together without having an idea of what the puzzle is supposed to look like when it is completed. You might attempt to use different approaches to determine some direction for solving the puzzle, you might get others to give you input about the process and outcome, and you might apply some problem-solving methods to the task. Conducting a thorough assessment is a similar process. As counselors and helping professionals, we often are unaware of what the end picture will look like for a client, but we have to begin to piece together the parts that will aim toward a solution to the presenting problems.

Selecting and utilizing *multiple methods* of data collection, which may be referred to as a multimodal approach to assessment, is essential in order to have checks and balances for information gathered. The methods utilized to collect assessment information can be broadly categorized as interviews, tests, and observations. Within each category is a wide array of *formal* (e.g., standardized tests, structured interviews, formal observation) and *informal* (e.g., unstructured interviews, projective techniques, checklists, questionnaires, anecdotal reports) instruments and strategies. The sources of assessment information may include the client, parents, spouses or partners, teachers, physicians, and mental health professionals, to name just a few. Figure 1.1 illustrates the various methods and sources that may be utilized in the assessment process. In most assessments, using multiple methods and multiple sources is important for obtaining information that is thorough enough to produce an in-depth understanding of the individual. Counselors should never rely solely on the results of a single assessment instrument or strategy to make important decisions about clients. In this section, we will present an overview of the methods (i.e., interviews, tests, observations) and sources of assessment information. Chapter 2 more fully describes each of these assessment methods and sources.

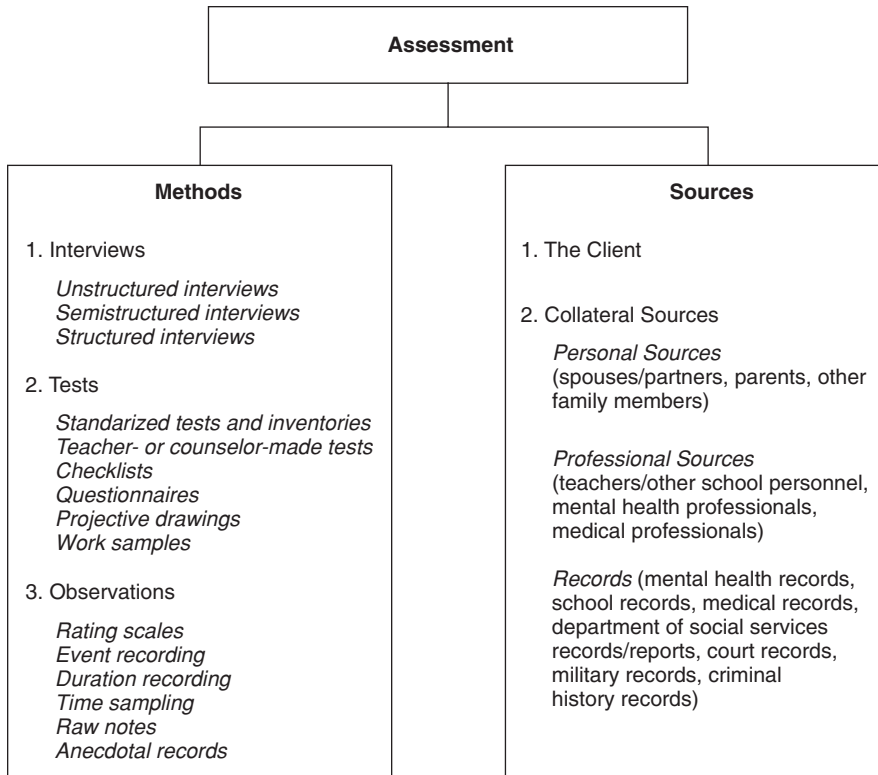


FIGURE 1.1 Multiple methods and multiple sources of the assessment process.

It may seem like an obvious point, but meeting face-to-face (or via camera) with a client is critical for gaining a complete picture from the assessment process. The *interview* is a face-to-face meeting of the assessment professional and the client. Interviewing may include such diverse techniques as unstructured interactions, semistructured interactions, and highly formal structured interactions. Its primary purpose is to gather background information relevant to the reason for assessment. The interview can be considered the single most important method of gathering information about the client's presenting problem and background information. Without interview data, information from tests and observations is without context and meaningless. In many settings, the interview is the primary (and sometimes only) assessment method used to collect data.

Tests are instruments designed to measure specific attributes of an individual, such as knowledge or skill level, intellectual functioning, aptitude, interests or preferences, values, personality traits, psychological symptoms, level of functioning, and so on. Counselors may use data collected from formal and informal tests, checklists, questionnaires, or inventories for several purposes, such as screening for emotional, behavioral, or learning problems; classifying or diagnosing certain attributes, problems, or disorders; selecting or placing individuals into training, educational or vocational programs, or employment opportunities; assisting in planning educational or psychological interventions; or evaluating the effectiveness of specific interventions or educational programs. Test results are

particularly useful in assessment, because they may reveal vital diagnostic information that would not have been uncovered through other assessment methods.

Observation is an assessment method that involves watching and recording the behavior of an individual in a particular environment. It is a way of seeing what a person actually does, rather than relying on others' perceptions of behavior. Observation is useful for collecting information about an individual's emotional responses, social interactions, motor skills, and job performance and for identifying specific patterns of behavior. Observation can be formal, involving the use of standardized rating scales and highly structured procedures, or informal, with the counselor taking raw notes regarding a client's verbal and nonverbal behavior during the assessment.

In addition to multiple methods, counselors use *multiple sources* of information. The client is usually the primary source of information during the assessment process. Other sources of information (called *collateral sources*) include *personal sources*, such as parents, spouses or partners, and others close to the individual being evaluated, and *professional sources*, such as teachers, physicians, mental health professionals, and other professionals. Information from collateral sources is valuable, because it is typically more objective and reliable than information obtained directly from examinees. Another source of assessment information comes from client *records*, such as school grades or attendance, previous psychological or educational assessment reports, mental health treatment plans or summaries, court documents, records from social services agencies, and so on.

There is no set standard as to the number of methods or sources that should be used in assessment. The methods and sources chosen for the assessment process typically depend upon the nature of the referral questions, the reason for assessment, and available assessment resources. The client interview is considered the cornerstone of assessment and is employed in almost all cases. However, utilizing additional methods and sources of information leads to a more complete and accurate picture of the individual being evaluated. For example, say that a mental health counselor working in an outpatient counseling center conducts unstructured interviews with clients to determine the reason they are seeking counseling and to collect relevant background information. The counselor also asks clients to complete a self-report checklist of psychological symptoms. From the checklist, the counselor discovers that a particular client has many symptoms of depression, which the client did not disclose during the interview. In this example, the use of the checklist provided essential information that was not uncovered by the interview alone. The client profile also might be more clearly detailed with the administration of some standardized tests; however, the counselor might not have access to these tests in his work setting.

The Assessment Process

Now that we have defined assessment and discussed methods and sources, it is important to reemphasize that the assessment process is more than simply giving a test. Assessment is a complex, problem-solving process that necessitates collecting and analyzing information about an individual in order to make decisions or inferences about that person. The first and most important step in the assessment process is to identify the client's problem(s) to be addressed and the reason for assessment (Urbina, 2014). A clear sense of why an assessment is being conducted helps counselors select the methods and sources of information that will provide an adequate basis for arriving at useful conclusions and recommendations (Weiner, 2013). In most instances, the process of assessment ends with a verbal

or written report that contains the assessment results and recommendations. In between the beginning and end points of the assessment process are other additional actions directed at collecting relevant client information. Although the process of assessment might appear overwhelming now, it can be broken down into the following four manageable steps (Hardwood, Beutler, & Groth-Marnat, 2011):

1. **Identify the Problem** The first step in the assessment process is identifying the presenting problem—that is, the reason that the individual is being assessed. Because assessment is so clearly linked to counseling, the reason for assessment and the reason for counseling are often one and the same. Reasons for assessment and/or counseling can stem from a variety of problems or concerns, such as academic or vocational performance, cognitive abilities, behavioral problems, or emotional and social functioning (Lichtenberger et al., 2005). In order to proceed to the next step in the assessment process, the counselor must have a clear idea about what the problem is and the reasons for which the client is being seen.

Clients may be self-referred for assessment, or they may be referred by another source, such as a family member, teacher, judge, physician, or human resources manager. Referral sources can help clarify the nature and severity of the client's problem through the specific questions they want answered about the client. Thus, referral questions are often directly linked to the problem being addressed in assessment. The following are examples of referral questions that help define the client's problem:

- Does this student have a learning disability? If so, does he or she qualify for special education or related services?
 - Is this child ready to begin kindergarten?
 - Does this child's problematic behavior indicate a diagnosis of Attention Deficit/Hyperactivity Disorder (ADHD)?
 - Is this individual suicidal?
 - Does this adult have Posttraumatic Stress Disorder (PTSD)?
 - Does this parent have a mental disorder that might interfere with parenting?
 - What are this individual's vocational interests?
 - How well can this employee be expected to perform if promoted to a management position?
2. **Select and Implement Assessment Methods** After counselors determine the nature of the problem that needs to be appraised in the assessment process, the next step involves selecting and implementing methods for collecting data (e.g., interviews, tests, observation) and determining the sources of assessment information. Counselors choose from among numerous formal and informal assessment instruments and strategies based on the reason for referral, the context in which the assessment takes place, and the adequacy of the instruments and procedures they will use. Interviews are used in almost every assessment to obtain background information about an individual, including family history, work and education background, social history, and other relevant cultural and environmental factors. Counselors may administer tests to evaluate a person's cognitive functioning, knowledge, skills, abilities, or personality traits. Observation may be used to record or monitor a client's behavior in a particular setting. Collateral information also may be obtained from family members, spouses or partners, and others close to the individual being evaluated. Although there are no set guidelines for which or how many assessment

instruments or strategies to use, in general, the more methods used to collect data, the more accurate and objective the information obtained.

3. ***Evaluate the Assessment Information*** A key task for counselors is evaluating assessment information, which involves scoring, interpreting, and integrating information obtained from all assessment methods and sources to answer the referral question. To be competent in evaluating assessment information, counselors need knowledge and skills in basic statistical concepts, psychometric principles, and the procedures for interpreting assessment results. Evaluating assessment information is a difficult step, because the counselor is often confronted with a dizzying array of information gathered during the assessment process. To organize this data, counselors can use the following steps (Kamphaus & Frick, 2010; Sattler & Hoge, 2006):
 - a. Document any significant findings that clearly identify problem areas.
 - b. Identify convergent findings across methods and sources.
 - c. Identify and explain discrepancies in information across methods and sources.
 - d. Arrive at a tentative formulation or hypothesis of the individual's problem.
 - e. Determine the information to include in the assessment report.
4. ***Report Assessment Results and Make Recommendations*** The final step in the assessment process is reporting results and making recommendations. This involves (a) describing the individual being assessed and his or her situation, (b) reporting general hypotheses about the individual, (c) supporting those hypotheses with assessment information, and (d) proposing recommendations related to the original reason for referral (Kaufman & Lichtenberger, 2002; Ownby, 1997; Sattler, 2008). The general hypotheses are the counselor's descriptive or clinical impressions of the individual that are based on multiple methods and sources of assessment data. When reporting these hypotheses, make sure to provide enough assessment data to support your conclusion.

Making recommendations involves identifying specific ways to resolve the presenting problem or referral question by addressing the assessment's key findings about the individual (Lichtenberger et al., 2005). Counselors recommend strategies and interventions that are designed to facilitate change and improve outcomes based on the individual and his or her assessment results (Kaufman & Lichtenberger, 2002). Because individuals are referred for assessment for a variety of reasons, recommendations vary depending on the referral questions. In addition, the setting in which the assessment takes place (such as a school, hospital, mental health clinic, college, or vocational training center) will influence the type and number of recommendations (Kaufman & Lichtenberger, 2002). For example, in school settings, most referrals for assessment involve students' problems that affect their academic performance. In this situation, recommendations typically focus on behavioral interventions, instructional strategies, or other appropriate educational services (Lichtenberger et al., 2005). Assessments at mental health centers are requested generally for diagnosing mental disorders, treatment planning, and monitoring treatment progress; thus, recommendations may include a variety of clinical interventions and techniques.

Competencies Required for Assessment

Just like professional counseling, you need both knowledge and skills to be competent in assessment. Although a course in measurement and assessment might provide you with the foundational knowledge of assessment, you would need supervised practice to be