

OBSERVATION FORM PERSONAL COUNSELOR

NOTE TO OBSERVER: Review the personal counselors duties and responsibilities PRIOR to your observation. Evaluate the personal counselor's performance and contact with their audience using specific, detailed examples.

*Context of observation may not be available, thus scores may be subject to modification at observer's discretion during face to face review with the observed personal counselor. (ex. Personal counselor may adopt a very casual communication style, which may seem inappropriately friendly, but in face to face review observer learns that student had series of traumatic incidences with authorities who adopted a rigid 'professional' style of communication).

OVERALL OBJECTIVE: To determine whether the counselor demonstrates proficiency in personal counseling services.

RATING KEY:

- A. Exceeds Expectations
- B. Meets Expectations
- C. Needs Improvement
- D. Unsatisfactory
- E. Not Enough Information/Not Applicable

Counselor:

Evaluator:

Date:

Scheduled Time:

Time service began:

Number of others present (students, supervisees, etc.):

Session Location:

Type of service observed (individual therapy session, group therapy, supervision, etc.):

RATING KEY:

A. Exceeds Expectations

B. Meets Expectations

C. Needs Improvement

D. Unsatisfactory

E. Not Enough Information/Not Applicable

Rated Section	A B C D E	Comments or examples of behavior
1. Expertise		
a. The personal counselor demonstrated clinical skills appropriate to the service observed.		
b. The personal counselor adhered to current laws and ethics put out by respective professional bodies (CAMFT, NASW, BBS, etc.) (if applicable).		
c. The personal counselor guided the student/supervisee towards further insight (open/closed questions, reflecting/ rephrasing, summarizing, process comments, etc.).		
d. The personal counselor demonstrated goal setting (when appropriate), collaborating with student/supervisee on realistic and appropriate goals.		
e. The personal counselor expressed empathy and care when appropriate; the personal counselor was present and open to student/supervisee.		
f. The personal counselor maintained their own emotional stability and self-control in relationship with student/supervisee.		
g. The personal counselor skillfully used self-disclosure when appropriate for a specific purpose and in service to the student/supervisee.		
h. The personal counselor created a psychologically safe space and maintained boundaries of the personal counseling/supervisory relationship.		
i. The personal counselor demonstrated establishing rapport and/or rapport building.		

j. The personal counselor understood power differences in therapeutic/supervisory relationship and managed those differences.		
k. Selection and use of interventions that are appropriate to student's background and culture.		
l. Remained within the scope of practice defined by the appropriate professional body (BBS, CAMFT, NASW, etc.).		

2. Responsiveness		
a. The personal counselor helped student/supervisee cope with/manage difficult emotions (interventions, psychoeducation, providing tools/coping strategies) (if applicable).		
b. The personal counselor helped student/supervisee prioritize their needs and create a plan (if applicable).		
c. The personal counselor remained present with student and followed their lead when appropriate; "met the student where they're at."		
d. The personal counselor was attentive to questions and comments.		
e. The personal counselor responded clearly and precisely to individual needs and special circumstances.		
f. The personal counselor adapted style of communication to student's developmental level.		
g. The personal counselor moderated facial expressions and body language to attune to client's emotional state.		
h. The personal counselor provided student with relevant follow-up options when appropriate (coordination with personal counseling staff, referrals, etc.)		
i. If applicable, the personal counselor demonstrated ability to change and adapt to unexpected circumstances/situations.		

j. If applicable, the personal counselor demonstrated awareness of signs and behaviors typical of a student in crisis and responded appropriately.		
3. Cultural Humility & Diversity		
a. The personal counselor demonstrated respect for culture (race, faith/religion, gender & gender expression, geolocation, socioeconomic status, history, sexuality, generational issues, etc.), and awareness of and responsiveness to ways in which culture interacts with personal counseling relationship.		
b. The personal counselor demonstrated non-judgemental acceptance of all aspects of the student, their situation, and their emotional needs.		

c. The personal counselor identified and acknowledged impact their own culture may have on therapeutic relationship.		
4. For observations of supervision only		
a. The personal counselor encouraged growth process by skillfully balancing giving answers vs allowing supervisee to explore and work towards solution themselves.		
b. Supervisee(s) left meeting with a clear direction, treatment plan, action plan or next steps with client.		
c. The personal counselor encouraged exploration of cultural aspects of supervisee's caseload, including (not but limited to) race, faith/religion, gender & gender expression, geolocation, socioeconomic status, history, sexuality, generational issues, etc.		
d. The personal counselor explored transference (client directing feelings, desires, expectations towards personal counselor that appear based on client's past feelings, desires, expectations about someone else) & countertransference (personal counselor transferring emotions to client) when appropriate.		
e. The personal counselor managed energy level and psychological safety of individual or group supervision to create environment for supervisee(s) to share honestly and be vulnerable regarding their clinical work.		
f. The personal counselor guided supervisee's mistakes to become learning opportunities.		

OVERALL PERFORMANCE RATING

- A. Exceeds expectations
- B. Meets expectations
- C. Needs improvement (Refer to Appendix G)
- D. Is unsatisfactory (Refer to Appendix G)

EVALUATOR COMMENTS:

I have met with the evaluatee and discussed the evaluatee's personal counseling observation.

Signed: _____ Date: _____
Evaluator

EVALUEE COMMENTS

I have met with the evaluator and discussed my personal counseling observation.

Signed: _____ Date: _____
Evaluatee