

## **“Qualitative Assessment: an Alternative to the IQ Test”**

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### **Introduction**

In 1941, my husband, George, and I founded Roeper City and Country School in Bloomfield Hills, Michigan. We soon became aware of the emotional characteristics and educational needs of gifted children. Under the leadership of Dr. Harry Passow, we convened a weeklong, intensive conference of experts to plan a learning environment appropriate for gifted children. By 1956, the school was converted into a school for the gifted. The IQ test was introduced and used, along with observation and interviews, to evaluate applicants for enrollment.

After becoming acquainted with a child, George and I began to estimate the applicant's IQ score. We understood that giftedness expresses itself in the emotional reactions of children. So we were not surprised when our independent assessment almost always coincided with the results of the IQ test, while offering important additional information. However, on many occasions, we found the test results to be much lower than our estimate. Usually, the tester herself felt the IQ test result was not a true picture. It became more and more clear that the IQ test gave us only a partial answer, namely, one that revealed the cognitive but not the emotional and spiritual characteristics of the gifted. I find this to be true to this day.

My husband and I retired from our work with the Roeper School in 1983 and moved to California, where we opened the Roeper Consultation Service for the Gifted, and developed what was to become the Annemarie Roeper Method of Qualitative Assessment (QA). For the next 20 years and up to the

present, I have continued to use this method of evaluation to determine giftedness. I help parents and schools to better understand gifted children and make appropriate decisions with them. Now in my 87<sup>th</sup> year, and after seeing more than a thousand children, I feel it is important that others learn to use this method and am currently training several people to continue it.

As time went on, more and more experts became interested in the QA approach, for they found it was filling a gap. They perceived a need to create a way to evaluate children based on those characteristics that have not been considered before—namely, the emotional and spiritual areas. A group of experts, that we named the Core Group, formulated the details of this approach. The Core Group is comprised of specialists with relevant expertise—professors of gifted education, practitioners of QA, clinical psychologists, and directors of schools for gifted children—who have worked with me for many years and see the importance of this method.

### **Philosophy**

If we are to understand children and their behavior, we must honor their inner world, relate to the unconscious as well as the conscious, and to the emotional as well as the cognitive. Education needs a clinical and developmental approach to assessment. My method of Qualitative Assessment uses a relational, experiential approach to facilitate the deeper understanding of individuals and thus nurture them in being more fully who they are. Through the QA method, we find that because the emotional part of giftedness is not well understood, children are frequently erroneously labeled as pathological.

Many schools profess to serve the whole child, and to provide appropriate educational approaches. However, they lack a legitimate, authentic method of assessing the whole child, of understanding the deepest wellspring of motivation and personality. QA fills this gap. It is a proven, rigorous means of experiencing the gifted child. It enables parents and teachers to more effectively open the door to learning opportunities and life experiences for the child. In this way, gifted children have greater potential to live their lives in a way that fully express who they are, enabling them to contribute to society with fewer obstacles.

### **Approach**

QA is used as an alternative to or in conjunction with traditional testing and offers a unique approach to evaluation for giftedness. The wealth of information gained through QA is used to facilitate more effective planning for the education and parenting of children to better meet their needs. It is based on an understanding of giftedness that looks beyond intellectual prowess or the ability to perform on an IQ test. The human psyche is one of enormous complexity, not fully measurable by standardized psychometric examinations. The only instrument complex enough to understand a human being is another human being. QA practitioners use themselves as the instrument through which to understand the child or adult. QA offers a broader perspective to the assessment process, revealing the inner world of the individual. This method acknowledges individuals in terms of their uniqueness, independent of the expectations of the practitioner, the school, or society.

By observing and reacting to a great variety of clues, including consideration of conscious and unconscious motivations, the practitioner replaces the conventional instrument of testing with his or her own finely tuned intuitive abilities to form an overall impression of the child. Central to the process is an attempt to understand the child's complex inner landscape. This understanding is supplemented by information and insights from the parents and the school, as well as the practitioner's own educational and psychological experience, empathy and intuition. The practitioner also draws on his or her own knowledge and experience of the characteristics of gifted children, such as heightened empathy, a strong sense of justice with a need to right the wrong, perfectionism, acute sensitivity, intensity and all-encompassing passion.

An essential element of QA is to provide an open and totally non-judgmental atmosphere in which the child has freedom of expression. When the practitioner suspends judgment, letting go of all preconceived notions, and giving, as Freud says, impartial attention to everything there is to observe, this is accomplished. The intention is to create a relationship of trust between the practitioner and the child. The practitioner conveys to the child that the purpose of the meeting lies only in discovering—with the child's permission—who that child is, without expectations of performance.

QA can be used to qualify children for placement in gifted programs and schools for advanced learners. It is extremely useful in designing programs, provisions, individual plans of development, and home education that nourishes the inner agenda, interests, emotional and spiritual development, and unique needs of the child. From insights gained about the child, the

evaluator helps build a bridge to the appropriate educational resources available to the family. Families are helped to construct their own educational path. The goal is to empower the child and the parents to take charge of their own destiny.

### **The Process of Evaluation**

The QA process begins with the initial contact between the parents and the evaluator. It continues with the parent interview and ends with another interview with the parents. In between, there is the centerpiece: the interview with the child. Much happens in this period that is of an emotional, spiritual and cognitive nature. Every part of this process is integral to the process itself.

For the evaluator, the process actually begins with the initial contact, whatever that may be—by telephone, via email, in a letter, in person, or through referral from someone else. There is an immediate emotional, as well as cognitive, reaction to the person making the contact (usually the parent). Information is provided regarding age, family, schooling, concerns, etc. The trained observer receives a beginning flavor, a sense of the child, which later may be revised. The initial contact is a period of intense mutual evaluation, which later will be repeated with the child.

Mutual evaluation happens in any encounter between living things. It is often distorted by past experiences on the part of either party. The evaluator needs to be aware of these potential distortions in him- or herself. There is, however, in most evaluators, a vast reservoir of past experience that trusts in

that intrinsic, uncontaminated knowledge within each person. This is a miracle in itself. Evaluators need to look at the whole process like a piece of art that is created by the encounter of the family, especially the child, with the evaluator. By the end, something new has been created--a dance, a piece of art, a symphony. In the process, the Soul of a child is recognized and, in so doing, the degree of giftedness of the child is understood.

### *Initial Interview with the Parents*

During this process, parents and evaluator create a common ground for mutual understanding and trust, allowing an image of the child's personality to grow among them. Within this framework, the evaluator attempts to gain as much information as possible about the child through interviewing the parents and reviewing background information offered in the parent questionnaire. Hopefully, channels of communication will open between the parents and the evaluator, thus creating a forum for cooperation to further address the needs of the family and child. Practical and emotional goals will be discussed, such as school facilities and short and long-range planning, and the evaluator discovers the expectations and the questions that the parents hope to have addressed.

### *The Child Encounter*

For their inner safety, children need to have at least a cursory view of the environment. Children have a remarkable facility for making immediate judgments of individuals and situations. Their first impression may occur outdoors. They survey everything in a glance, with touching, with questions, or with silence.

The evaluator observes the way the child's counter-evaluation takes place. The manner in which the child appraises the situation is the first sign of the essence of the child. The child may be afraid, curious, anxious, calculating, comfortable, knowledgeable, etc. The evaluator receives this information about the child intuitively and through careful observation. The child's eyes are a most important clue. They may be darting all over the place, while the child is doing something else. This time, when the child is engaged in spontaneous evaluation of the situation, is rich in emotional and cognitive information for the trained observer.

These are some of the questions that children need answered in their hearts:

*What is expected here?*

*What is permitted?*

*Must I be careful to protect myself?*

*Are this person's intentions honorable as far as my Soul is concerned?*

*Can I trust this person with my inner agenda?*

A desire to share or a need to protect may be born instantly. Unconscious as well as conscious choices are made at this point. These are reactions that will have an impact on any type of evaluation—IQ tests, as well as others. With QA, there is the hope that in the end, few emotional obstacles will be

left in the way of open expression and communications of thoughts and feelings. However, even those hindrances present clues to the essence of this child, as well as about his or her giftedness. In this initial stage, a child may answer questions selectively, picking out those that seem safe.

There is an almost palpable moment when the child's counter-evaluation is complete. It feels as though the light or the air changes. Even though this process may never be completely over, if the evaluator passes the child's inspection, there is a clear moment of relaxation. From this moment on, the structure and content of the session practically creates itself. Young children may use the toys available or those they brought from home. It now becomes totally the child's agenda, even if it becomes very repetitive and seemingly nothing happens.

The goal is not for children to show how much they know or how bright they are, but *who they are*. This information presents itself in a pure form, almost like a byproduct. This is sacred information and must never be misused. Care needs to be taken by the evaluator not to interrupt the flow of expression by becoming impatient and thus influencing the course of events. Yet questions do have a place to encourage a child to convey what s/he really wants us to know. The interaction between the child and the evaluator is most valuable for the insights that the observer receives. The child may keep at a distance, seem to be oblivious of the evaluator, or get close, touch, talk trustingly, excitedly, and be eager to share. The secret is to further the flow of expression, when needed, without changing it.

Children draw, play games, and often talk for a whole hour, interrupted by occasional questions. As one of the characteristics of giftedness is over-excitability, the flow of information is often formidable. There are also situations where the child is lost, as if in a trance, and never acknowledges the presence of the observer. Some are very slow in their actions, while others are extremely fast. Either can be a sign of giftedness.

The parents wait in another room. Occasionally, the child needs to check on them for his or her emotional safety. Sometimes one can feel that the child's attention is really with the family, especially if there is also a sibling waiting. Sometimes the child needs to go outdoors or to move. The events of the session are unpredictable—always a surprise.

The evaluator is not constrained by the clock-hour, but tries to keep the session to around an hour. An hour and a half is not unusual. The observer gently ends the session by allowing a transition phase, and observes that procedure. It is amazing for me to see how reluctant the children usually are to leave, even though I am old, cannot hear well, cannot get down on the floor with them, and do not have the latest toys. It is because they feel understood, recognized and accepted. This experience, in itself, often becomes an important event for them, because the children have been seen and recognized.

Keeping track as the session unfolds can be difficult for the evaluator. Having someone else take notes, or recording the session, helps the observer be present and open to take in everything. As soon after the session as

possible, so as not to get lost, written notations of impressions should be expressed to reflect the emotional impact of the session.

### *Final Discussion*

The final session with parents is equally important and handled in the same intuitive manner. Parents are deeply involved emotionally in everything concerning their children and need to feel recognized and understood for who they are, as well. The same mutual evaluation process takes place. Mutual emotional acceptance and communication needs to occur. This session also includes specific recommendations for schools, family interactions, etc., which are also handled within this new relationship with the evaluator. A carefully written report may also be prepared.

Throughout the whole process, the evaluator gains the necessary insights into the child's giftedness, personality, and inner world. She checks her observations against her experience, as well as her cognitive knowledge, and awareness of the characteristics of giftedness. She knows that certain emotional and spiritual characteristics come with giftedness, such as overexcitability, perfectionism, sensitivity, sense of justice, etc. She knows that when a child worries about the concept of death at the age of three, that he may be gifted. She takes all of this information into account in her evaluation.

The evaluator's knowledge of giftedness provides cognitive information and her intuition allows her a degree of certainty that she has received an accurate impression of the child. She has connected emotionally with the child and the parents, has trusted her intuitive insights, and is able to share

her understanding of the child. Inherent in these results is always the recognition that one can never totally explore and understand another human being.

### **Further Thoughts on the QA Process**

In trying to write this chapter, I am more and more assailed by differing and contradictory thoughts and feelings about assessment itself, about our right and also our real ability to assess another human being. How are we qualified to judge each other, and what is the purpose of this judgment? Each Self is a mystery we can only penetrate down to just a little sliver of knowledge. We truly know little about the human soul, about its enormous complexity and its relationship to the universe and to other souls. We know even less how to judge it. Why do we want to make these judgments? How do we want to use this knowledge? We need to be really clear about the reasons for this invasion of privacy. Do we want to use the child for our own purposes, using his talents for ourselves? Or do we want to help him truly find a place for his sacred Self in this world, and to protect it from harm?

In the 40+ years I have worked with gifted children I have seen more than a thousand of them. I continue to be in awe of each young soul with which I am privileged to become familiar. I have learned a great deal about each Self, or soul. I've experienced their emotions, anxieties and joys, passions and ambitions, and I see that each Self is perfect in itself. It is only when we start comparing them to each other that we begin to see imperfection.

When we create norms against which to judge success and failure, or achievement, they are a result of some vaguely agreed upon sense of

common reality. So we must understand that our evaluation results are basically arbitrary. We don't really have a common reality. Whatever we experience is from within the "I" of the beholder. No two people have exactly the same experience, nor can they actually share it with each other. But human beings need guidelines, need to have a ground on which they can put their emotional feet. And so we have decided to create an arbitrary basis on which to measure people. How do we justify this measurement, and most of all, how do we know that we are correct, or even what would constitute correctness?

These are the questions we need to ask ourselves. And it's because I've seen so many children, each presenting an extremely complex unit, complete in itself and basically inaccessible to cognitive evaluation, that I am beginning to even doubt my right to make any kind of assessment.

In my work in the QA method, I have learned to see the soul of the child in itself, without the emotional layers imposed by our expectations and judgments. However, we do *create* a common reality, and we judge others according to some often unspoken rules. One of the ways in which we evaluate children is by testing them in various ways, many of which are based on recognizing a subject's cognitive abilities and giftedness. In my work with gifted children, I have found that giftedness is based on emotions as well as cognition, hence my development and use of the QA method.

I have seen many highly gifted children who had difficulties integrating into society's expectations and were therefore diagnosed as having problems and disabilities. It is this realization that led me to develop the QA approach. I

now believe that the word “Assessment,” may not quite represent the approach that I am using. I think we need to replace it with the concept of recognizing the individual self, devoid of any attachments and expectations.

The next step after recognizing the Self of the child must be recognizing the manner of integration into the world that surrounds us. It is for this reason that it became important to create a different approach to understanding each child so that we can help him or her to find their proper place. The purpose of QA differs from the purpose of other evaluation processes in that we are not looking for a judgment of ability, but a realistic understanding with which to keep this precious soul out of harm’s way.

Few of the children that I see actually have IQ tests anymore because most of the parents see Qualitative Assessment as a valid way of understanding their children, but whenever there is a comparison to the IQ test, it comes out to almost exactly the number at which I had arrived. Actually, the reason parents like the QA approach is because there is a real change in the expectations of parents who are interested in knowing WHO their child is and then finding the right environment for them, rather than knowing WHAT he or she can do.

As mentioned before, many of these children have difficulty fitting into the expectations of the world around them, and the more highly gifted they are, the harder it is for them to integrate. We have learned that through the QA method we can recognize the degree of giftedness, and the qualities that are attached to this, and knowing this will help us in trying to find the best environment in which this soul may thrive.

So why did I spend my life assessing all these children? The reason is that by doing this Qualitative Assessment, I find the characteristics which are the basis for the way these children live their lives, and by knowing them, we can help them find their own place and, hopefully, create the kind of growth environment that will lead to their becoming an asset to society, changing it, rather than being seen as the problems and the outsiders, and a detriment to society.