

# Employee Referral

## ORGANISATION DETAILS

**Contact** \_\_\_\_\_

**Organisation** \_\_\_\_\_

**Address** \_\_\_\_\_

\_\_\_\_\_ *Postcode* \_\_\_\_\_

**Telephone** *Office* \_\_\_\_\_ *Mobile* \_\_\_\_\_

**E-mail** \_\_\_\_\_

## EMPLOYEE DETAILS

**Name** \_\_\_\_\_

**Telephone** *Office* \_\_\_\_\_ *Mobile* \_\_\_\_\_

**E-mail** \_\_\_\_\_

**Skype** \_\_\_\_\_

## REFERRAL TYPE

\_\_\_\_\_ **Counselling/Psychotherapy** - helping people manage or change repeating or intense emotions or patterns of thinking or behaving that affect them at work.

\_\_\_\_\_ **Leadership Coaching** - assisting people to be clear about goals, use a range of skills and strengths, overcome challenges, be authentic and take action.

## PRESENTING ISSUE

What has led to this referral?

What has already been put in place for the employee?



## DESIRED OUTCOME

For Organisation

For Employee

## STANDARD PROGRAMMES & FEES

\_\_\_\_\_ **Counselling Programme.** Three 1-hour sessions, once every 2-3 weeks. £250

Are you willing to extend the series of sessions as required YES / NO

\_\_\_\_\_ **Leadership Programme.** Six 90 minute sessions meeting once a month including follow-up notes, range of personality tools and assessments, email support. £1400

\_\_\_\_\_ **Personality Assessments.** Assessment and 1 hour coaching session plus follow-up resources. £195 each

Fees will be invoiced at the conclusion of the first session.

## LOCATION AND TIMES

\_\_\_\_\_ At my practice  
14 Sunnyside,  
Kendal

\_\_\_\_\_ Phone / Skype /  
Face time

\_\_\_\_\_ At your venue (travel  
expenses charged at  
45p/mile or equivalent)

Appointments are booked at mutually convenient times. As I also undertake corporate consultancy and deliver training courses availability can vary week to week.

On rare occasions we may need to reschedule your appointment. 24 hour cancellation is required to reschedule any session without charge.

## AGREEMENT

### Outcome Focus

All sessions are conducted with the clients goals in mind. We will work towards the clients outcomes each time we meet and review overall progress regularly.

### Initial session

The initial session will include introductions and assessment of the area(s) to be addressed. If it is not appropriate for us to contract together I can suggest an alternative coach or therapist, should that be required.



**Professional**

I am an NLPtCA Accredited Coach Trainer, UKCP Registered Psychotherapist, Registered Supervisor, member of the Neuro-Linguistic Psychotherapy and Counselling Association. I am bound by the UKCP, NLPtCA, and INLPTA codes of ethics and conduct.



**Integrated support**

If the client is receiving care from any agency (GP, hospital, psychiatrist, CPN, etc.) appropriate permission must be agreed before the sessions can commence.

**Supervision**

To maintain professional standards and to ensure I offer clients the best possible service I may discuss cases anonymously during formal supervision.

**Confidentially**

The power of the relationship is based on honest, direct and personal conversations. All information disclosed is confidential with the exception of where I believe the client or another is a danger to self or others, where minors (under 18) are involved or if disclosure is ordered by a judge, coroner or other official having such power.

I may make written notes during the session; these will be kept securely.

**REPORTING REQUESTED**

- \_\_\_\_\_ **None required.** The employee will report directly to us.
- \_\_\_\_\_ **Initial Assessment.** Brief notes detailing the initial assessment of the employee and plan for working with them over the number of sessions.
- \_\_\_\_\_ **Summary Report.** Outline of the main achievements within the sessions (agreed with the client) and suggestions for the future.
- \_\_\_\_\_ **Coaching Review.** To discuss how the process of the coaching worked and the general themes discussed. The client specific content of the sessions is confidential.

I will discuss the reporting arrangements with the employee at our first meeting.

**INITIAL CONTACT**

\_\_\_\_\_ Please call / email them                      \_\_\_\_\_ They will call / email you

**BOOKING**

*Please begin working with them as indicated in this document.*

Signed \_\_\_\_\_ Date \_\_\_\_\_