



**Guidelines and Check-List for
Denominational Executives Referring Individuals
For the Clinical Assessment Program**

For the Clinical Assessment program to be effective, it is important that communication with all of the parties involved be as clear and complete as possible from the outset. The following guidelines and check-list are offered in an attempt to assure that the critical procedures are defined and implemented.

Guidelines

1. Make the determination that a clinical assessment with a written report is most appropriate for the individual with whom you are working. (An alternative option is a developmental assessment program in which there is no report. If you have a question about this, a member of the LeaderWise counseling staff would be glad to discuss this decision with you.) In general, clinical assessment programs are intended for situations in which you need a thorough assessment to provide answers to clinical questions that are necessary for you to deal administratively as well as pastorally with an individual. It is important to keep in mind that the decision to do a clinical assessment is your decision in most instances and not the participant's. Your confidence in that decision is highly significant in setting the stage for a helpful and effective process.
2. Once you have made the decision, there are several important things to communicate to the individual, and that is best done, if possible, in person. It is important to indicate that the clinical program is intended to assist him/her, and that it is also intended to provide you with some questions that you are asking LeaderWise to respond to, and that you will be sending her/him a copy of the questions. After you have made the decision to refer for assessment and discussed that decision with your client, prepare a referral letter with the questions you want answered in the clinical assessment and a request for a written report to be sent to you.
3. In the referral letter, formulate a list of questions that you want answered through the clinical assessment. (If you are having difficulty formulating the questions or are not sure your questions can be addressed in the clinical assessment, don't hesitate to call and talk with the LeaderWise counselor.) In our experience, sending us three to five well-focused questions results in a better assessment and report than sending too many questions that try to cover every angle. Some questions which are typically addressed in an Clinical Assessment include:
 - 1) Does the pastor understand the impact of his/her behavior?
 - 2) Does he/she take appropriate responsibility for his/her behavior?
 - 3) To what degree were personal depletion and stress factors in his/her behavior?
 - 4) What is the state of his/her emotional and psychological well-being?

- 5) Under what circumstances could this person re-enter ministry with a reasonable expectation of safety?
 - 6) What underlying issues or deficits contributed to his/her behavior and what is needed to address them?
 - 7) How self-aware and capable of self-management is he/she?
4. Send a copy of the referral letter and questions to LeaderWise and to the client, so both the individual and LeaderWise are aware of the focus of the assessment. In the letter of referral, make it clear that the individual is to call LeaderWise for an appointment. LeaderWise will let you know when the client has scheduled a clinical program.
 5. Also, in the referral letter, indicate that the client will be asked during their program at LeaderWise to sign a consent/release of information form which allows LeaderWise to share the results of the written assessment with you.
 6. The psychologist from LeaderWise will prepare a written report as quickly as possible and send it to the client and to you (assuming the release has been signed at the beginning of the program). The client may be asked to review the report to check the social history and medical facts sections for accuracy prior to sending the report to you. The report will be sent to you and to the client by mail.
 7. Determine whether follow-up sessions are necessary based on the recommendations of the counselor. The clinical program in its design anticipates that there will be times when follow-up sessions will be warranted. Feel free to raise that possibility with the counselor. Follow-up, for example, could include a session in which you, the client, and the counselor meet and talk together.

A Checklist of Important Steps Once You Have Asked an Individual to Participate in an Evaluative Program

- _____ 1. Determine in consultation with a LeaderWise counselor that the clinical program is appropriate.
- _____ 2. Prepare a referral letter on the precipitating issues and questions you want LeaderWise to explore;
- _____ 3. Send copies of these materials to LeaderWise and the person whom you are referring.
- _____ 4. Inform the person you are referring the focus of the clinical assessment program, including the necessity for her/him to sign a release at or prior to meeting with LeaderWise.
- _____ 5. Have the person referred contact LeaderWise to schedule the program date.
- _____ 6. Initiate any needed discussion regarding follow-up contacts or sessions with LeaderWise.