

## Referring to other Practitioners or Services

As we have mentioned previously, coaches do not offer any form of treatment for healthcare challenges. They are of course a powerful ally and resource for people engaging in changing aspects of their lives to meet the challenges that life has brought them.

We recommend, and see it as best practice, for coaches to have a system of referral covering as wide a range of support and services as possible. This best practice forms part of the coaching professionals' ethics and responsibilities.

Recovery and Wellness coaching is set in a framework of multi-disciplinary approaches to, and therapies for a number of healthcare challenges that are both aggravated and can be recovered from in part or, in some cases entirely through behaviour and lifestyles change by the person experiencing the challenge.

Coaches need to be aware of the approaches within the specialty they wish to coach in (i.e. Diabetes, Substance Misuse etc.) as well as have relationships with practitioners ( both medical and non-medical ) connected with the specialty.

As a client develops and carries out a recovery to wellness plan so some of these complementary treatments, therapies and / or other resources may be a desired and / or urgent part of that plan.

This is especially so where the client is in need of services that fall into the lower part of the curve of the "Where Recovery and Wellness coaching Fits" diagram and where there may be crisis, loss of control and severe or total reduction of client choice.

So if your client is not in some kind of recovery then they may wish, and your coaching relationship may well lead them to want to find some kind of treatment as part of initiating / developing their recovery process.

It may also be that it becomes desirable for your client to seek other services that are not treatment related but that are relevant to increasing their support network, their sense of wellbeing and their desire for change, recovery and wellness.

These may be complementary services that your client wishes to engage with as a way to support their lives and recovery.

Bearing this in mind it is advisable to have the widest set of possible options within your own knowledge base.

So, having decided to establish or build relationships with other professionals and services to whom you can refer your clients, it is advisable to check whether some of these professionals are aligned with the work you do as a recovery and wellness coach.

As recovery and wellness coaching is often perceived as a cutting edge 'new' approach, (which in some respects it is) it is likely that few professionals will in fact have any clear idea what recovery and wellness coaching is. Furthermore there may well be those who have a definition of coaching generally that is not aligned with recovery and wellness coaching.

It is therefore advisable that you do some educating as you go along.

If you are working alongside other professionals in a particular sector then be sure to develop and maintain open lines of communication with them about recovery and wellness coaching, share information and success stories (whilst maintaining client confidentiality).

### **Referring a client.**

Your client may need assistance and support from a source in addition to you. You are the coach and part of working with this client is assisting them in finding out how they are going to integrate and manage the issues relating to their health challenge.

So when do you offer or agree to refer? There are four scenarios.

- 1. When your client wants you to**
- 2. When you think that your client might benefit from another resource**
- 3. When you wish to make coaching conditional on a referral**
- 4. If you deem that your client may be at risk, or may be a risk to themselves or others**

Let's start with the first.

### **1. When your client wants you to**

Your client may bring it up in a coaching session. It may be expressed directly or you may pick it up indirectly. Either way, reflect back to your client what you are hearing.

Ask the client if they feel that they would like to see another type of person or practitioner or look into any kind of treatment, therapy or support in the context of their recovery to wellness.

Tread a little carefully here and be sure to remain neutral. Sometimes clients are on a 'fishing expedition' to see if they can flush out an agenda from the coach. Avoid then pouncing on *their* suggestion like you have just been waiting for it to show up!

Appearing to be too invested in the idea of some other service can elicit a suspicion that you, the coach, have your own agenda for them.

If you notice that you do have your own agenda then your client will be best served by your "self-management" of that agenda and you will put it to the side so that it does not get in the way.

Ask the client what, if anything, they have in mind. If they are unsure and want more information, then this can become a piece of homework for them once you have explored it together. If they do think they want some other kind of support, information etc, then get them to brainstorm and establish options and ideas. Exclude nothing, however "out there" it may seem to you and especially if it's your client's idea.

It may include one or more of the following; medical doctor, rehabilitation clinic, counsellor, nutritional consultant, psychotherapist, addiction counsellor, Yoga / Pilates classes, teacher, CBT practitioner, priest, meditation teacher and/or group, vicar, Rabbi, church group and so on.

Any kind of physical, emotional, spiritual, psychological practitioner or facility is an option. Once you have a list then ask your client to make some choices around the list in relation to the underlying reason they express as to why they want to consider some other forms of support. If you and the client have a recovery to wellness plan then ask them to consider the options in light of that plan. If you do not have a plan yet, this might be a great place to ask your client if they would like to create one. Whatever the scenario this new space opening up is valuable and you can keep this within your coaching relationship going forward.

The next scenario is:

## **2. When you think that your client might benefit from another resource**

At some point in the coaching it may become apparent that the client is in need of services and support that you as a coach do not offer.

If you genuinely feel that the client could benefit from some other assistance, then ask permission to offer a suggestion. ***If your client agrees that you can, then go ahead.***

Make sure that you set out your reasons and how what you are offering to refer them to is different to coaching. Unless you plan to make such a referral a condition of your coaching this client ( see 3. below ) then do not push the client in any way but rather let them sit with it.

Most likely your client will want to consider it and may want more information.

Setting out positively what another discipline might support them in is the main focus of any explanation. Doing some research and getting more information might be a good piece of homework to request from your client.

These first two scenarios are relatively simple. The next is less so.

### **3. When you wish to make coaching conditional on a referral**

Sometimes clients have psychological and emotional issues that go beyond the scope of coaching alone. It is important to understand that when you decide that this is the case then you will want to refer the client to other support systems.

It may be that you decide that you want to make it a condition of continuing or starting coaching, that a client seeks some assistance in some other field. It is absolutely acceptable to do this, provided you understand the impact this may have on the coaching relationship and this is something you may wish to bring into the coaching relationship at some future time.

If you think that the client may need specialist advice and support, then tell them so and why, explain that you are willing to continue coaching them provided they seek other support. Ask them if they are willing to accept this as a condition of the coaching.

It is important to contextualize this. Explain clearly what coaching does and doesn't do, what it offers and how this sometimes means that it is not the most appropriate course to follow on its own.

If they ask you to suggest a practitioner, then do so if you have one that you want to offer. It is fine if they prefer to find one themselves.

If they agree then integrate this into your coach–client relationship agreement.

Now we come to the last scenario.

### **4. If you think that the client may be at risk, or may be a risk to themselves or others, i.e when you need to for Ethical reasons**

If this is the case, then whether you are going to carry on coaching or not, your concern needs to be brought to the client's' attention and then, if the client is not open to or willing to get help, you would need to notify the relevant professionals and/or organizations'.

If you are working within an organization then it will be required to follow and match the organizations' policies and procedures.

If you are working alone then your responsibility is to comply with the relevant laws under which you practice as a coach.

Let's move on now to a general point related to referring.

### **Beware of rescuing**

It can get a little confusing; insisting on a referral for a client can be tantamount to diagnosing them. For example, if you have not run a proper evaluation and diagnostic test with them,(whilst stepping out of your role as a coach), and if you tell your client that unless they check themselves into treatment or other facility for a condition you think they have then you will be unable to coach them, you are effectively telling them that you are diagnosing them. You should never be diagnosing a client as a coach even if you have the expertise. It is almost impossible to create a clear coaching relationship with someone once you have made such a diagnosis.

Clients can easily obtain diagnosis from appropriate practitioners and you can coach them to do that if they so wish.

A better approach, should you have high levels of concern, would be to ask the client if they have ever wondered about their health or the issue you think you can see and make a request that they investigate it more with someone who has the expertise.

The key aim here is to communicate your real concern for their welfare, be it physical, emotional or psychological. This could be a specialist, doctor or other professional who will run their professions diagnostic tests. If, for instance, you are asked by your client whether you think they have a certain problem resist the temptation to offer your opinion.

If they agree to go to see someone as a condition of the coaching, then you at least have all your coaching options open when they come back.

If you would like to get them to start thinking about aspects of their behaviour and health then there are various self-appraisals that you can offer them which they can go through. You can then be curious with them about their results.

There are many reasons why a person suffer health challenges.. Until the coach is well acquainted with the client's life and circumstances, they really cannot say what is driving their condition and more importantly, it is not the Coach's' primary goal.

The main goal is the client's understanding of it. As we know there are many reasons that may be driving the situation and the real win is for the client themselves to become curious and informed about themselves.

The coach may have a hunch, but that hunch is best used in service of the client by utilizing coaching techniques to get the client and coach curious about what makes the client tick in this area and why.

Getting the client interested in why they are the way they are is more empowering and spacious for them than being told. So avoid subtly rescuing the client, avoid the temptation to get drawn into a place where you as the coach think you 'know' what is going on for them and the insights they could have, which you then try to point towards or get them to 'see'.

And finally...

## 5. Setting up the referral

This is straightforward; it's best if it is the client's' decision as to how to make the referral except of course if you have decided that there are clear threats to the clients or someone else's well being and action needs to be taken right away.

In this scenario there may be a clear need to refer and the coach acts on this need even if this means that the client does not make the decision for the referral to be made. This may include making quick direct contact with the practitioner in your network when the situation is urgent and there is no time to set up a written introduction. It is though always best to follow up such quick action in writing confirming what has taken place.

If this is not the case then the coach can prepare a letter for the person the client needs to contact. It is advisable that this letter be written with the client present or written and sent to them via email or post for their approval and agreement.

It is very important to frame the relationship with the other practitioner clearly. Avoid offering opinions on diagnosis of any condition. Request that the recommended practitioner make their own professional assessment in partnership with your client.

***Ensure the practitioner is clear about the role of a recovery and wellness coach.*** Explain that you, the coach, and your client have agreed that another practitioner may be of some assistance to the client in some aspect which the client and practitioner will determine.

Explain that you will either continue with the coaching or will be taking a break, whichever has been agreed with the client.

Offer to let the practitioner have more information about the role and purpose of recovery and wellness coaching, which as mentioned previously many professionals are still unclear about.



Equipped with the letter, the client can then proceed with contacting and working with the new practitioner if that is what they decide to do. Whether the referral is part of the clients agreed action with accountability is determined in the coaching session. Whatever the decision, keep checking in with the client around it.

Sometimes clients change their minds; don't like their interaction with the referral person or organization or after connecting with them decide that they want to look at other options. This sizing up of options is an important part of the client's process and the coach needs to keep a neutral and curious agenda around their choices. Always pointing to learning, self-knowledge and integration for the client.

Finally, many other practitioners within the field are more than one agenda. There may be explicit or implicit pressure to 'sell' some treatment and / or services to your client.

This cannot be avoided in all circumstances but you can reduce the risk of this happening by choosing people you have in your referral list carefully making sure they understand your work and that they are familiar with recovery and wellness orientation.