



Counselling and Client Assessment Policy

Standards for ethical, confidential, supervised and appropriately assessed counselling delivered by LilyAnne's.

LILYANNE'S WELLBEING POLICY

ETHICAL PRACTICE • INFORMED AGREEMENT • SUPERVISION • SAFE RECORDS

Live policy

Effective September 2026 • Review by September 2027

Document control

Document owner	Clinical Lead
Applies to	Counsellors, trainees, supervisors, referral workers and administrators supporting counselling
Status	Live
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Effective date	September 2026
Next review	September 2027, or sooner if required

This is a live LilyAnne's Wellbeing policy. It applies from September 2026 and should be read alongside the related policies and procedures identified in this document.

Purpose

This policy sets the minimum standard for counselling and client assessment at LilyAnne's. It should be read with the separate Client Suitability, Counselling Boundaries, Safeguarding, Attendance and Information Security policies.

Professional standards

Counsellors must hold qualifications appropriate to their role, work within competence, maintain continuing professional development, use regular clinical supervision and follow the ethical framework of their professional body.

- Trainees work within placement agreements and enhanced oversight.
- Professional membership, insurance and any required checks are verified and recorded.
- Concerns about competence or fitness to practise are escalated promptly.

Referral and access

Referrals are received only through approved routes. Staff acknowledge referrals, explain the process, protect confidentiality and avoid promising a service before suitability assessment.

Initial assessment

Assessment is collaborative and proportionate. It considers the person's goals, presenting concerns, preferences, relevant history, current support, access needs, risk, safeguarding, expectations and whether LilyAnne's can safely offer useful counselling.

- Explain the service and foreseeable limits of confidentiality.
- Identify reasonable adjustments and communication preferences.
- Agree what urgent or crisis support sits outside the service.
- Record the decision, rationale and any signposting.

Therapeutic agreement

Before regular sessions, the client receives an accessible agreement covering purpose, frequency, duration, location or platform, cancellations, contact between sessions, records, supervision, confidentiality, safeguarding, review, endings and complaints.

Confidentiality and safeguarding

Confidentiality is fundamental but not absolute. Any disclosure without consent must have a lawful and ethically justified basis, be limited to necessary information and be recorded. Safeguarding and immediate-risk decisions follow the Safeguarding Policy.

Session delivery and review

Counselling is reviewed collaboratively to check that it remains safe, appropriate and helpful. Frequency and length follow the commissioned or agreed service model rather than an assumed fixed number. Extensions require clinical rationale, capacity consideration and authorisation where required.

Supervision

Counsellors attend supervision at a frequency appropriate to workload, experience, professional requirements and risk. Urgent safeguarding or ethical decisions are not delayed until the next routine supervision session.

Clinical records

Records are factual, adequate and relevant. They include referral and assessment, agreement, attendance, concise session notes, risk and safeguarding decisions, communications, reviews, referrals and ending. Records are held only in approved systems with role-based access.

Endings and onward referral

Endings are planned and reviewed where possible. If counselling is no longer safe, beneficial or within competence, the counsellor explains the decision, manages immediate risk, offers suitable signposting and records the rationale.

Quality, complaints and monitoring

The Clinical Lead monitors supervision, professional requirements, themes, incidents, outcomes and feedback. Clients can complain without losing respectful access to support. Trustees receive proportionate assurance information.

Related documents and references

- Equality Act 2010 - legislation.gov.uk/ukpga/2010/15/contents
- Data Protection Act 2018 and UK GDPR - ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/
- LilyAnne's Wellbeing Safeguarding Policy and Privacy Notice.
- BACP Ethical Framework for the Counselling Professions - baccp.co.uk/events-and-resources/ethics-and-standards/
- BACP confidentiality and record-keeping guidance - baccp.co.uk/media/20401/baccp-confidentiality-and-record-keeping-crp-gpia065-jan24.pdf