

SYRACUSE UNIVERSITY  
Counseling and Human Services

CONSULTATION SUMMARY

Consultant: \_\_\_\_\_ Date: \_\_\_\_\_

1. Relationship between consultant and consultee:
2. Dates and length of meetings:
3. How was consultation initiated?
4. What was the presenting issue?
5. Describe your activity following these stages:
  - a. Pre-entry
  - b. Entry
  - c. Diagnosis (including whether the consultee's problem is lack of knowledge, lack of skill, lack of confidence, or lack of objectivity?)
  - d. Formulating a plan (including the focus of the consultation as client-focused, consultee-focused, or system-focused)
  - e. Implementing a plan
  - f. Evaluating the intervention
  - g. Evaluation consultation process (including some reflection on skills that were most helpful and/or most challenging)
  - h. Disengagement
6. What cultural issues (e.g., race, gender, class) influenced the interaction? How did you address these?
7. Did the consultee raise any personal issues? How did you redirect the discussion?
8. What level of trust do you believe was established prior to the intervention? Prior to the conclusion of the consultation?
9. What was the outcome of this consultation experience?
10. Additional comments/impression about the consultation process.

(Adapted from form used by Paula Gill Lopez.)