



www.pursuitsnetwork.com | 303.886.0272

1877 Broadway, Suite 100
Boulder, CO 80302
Policies and Procedures

Mission Statement

The mission of Pursuits is for this extraordinary network of therapists, psychologists, coaches and contractors to provide a rich array of services for clients and companies that empower them to achieve their goals. We assess and plan services to enable them to succeed. We are inclusive of all ages and stages, individually or with couples, families, groups, organizations, companies or community outreach. We work with clients, employees of organizations and the leadership.

We exemplify a company culture of connection, positivity, collaboration and innovation. The Pursuits community is strengthened through weekly networking opportunities, team development events and as well as community outreach.. In this way we inspire and build leadership within our network as well as thought leaders in our local, national and global community.

Organizational Structure:

CEO- Sharla P. Macy

CFO-Jill Fleishman

Please refer to the website for the full list of positions and organizational roles.

Providers:

Pursuits licensed therapists and coaches and consultants work on an Independent Contractual basis. Inclusion in the network is contracted with an annual fee as well as contracted rate for service. Within this Policies and Procedures document, the terms “Contractor” and “Provider” have the same meaning and are used interchangeably.

Joint Venture Contracts and Community Collaboration and Affiliation- Pursuits will engage with like-minded community organizations and companies that exemplify our core values and mission through the above stated agreements.

Core Values:

This is the driving mission of Pursuits is to empower the clients and the organization we serve to Envision. Increase Belief and Achieve their goals and dreams. serve.

Leadership: Pursuits will exemplify strong and effective leadership as well as support the development of leadership among our network , organizations and community.

Service to clients while integrating this value on a personal as well as professional level. Service to our community and to our world is an integral part of our outreach.

Innovation –We are creative and collaborative thus exemplifying innovation and cutting edge quality.

Excellence –This will be reflected through our service and outreach.

Growth and Education - Pursuits will align with those resources and educational venues respective to our own business development as well as to each area of professional specialization we represent.

Holistic Health and Wellness - Pursuits will implement a culture dedicated to integrative health that will be outcome based.

Positive and Thriving Company Culture: Pursuits will exemplify engagement, connection, autonomy and growth. We will increase engagement and motivation our win-win-win model Our Network Providers will receive opportunity to market and take on Company Liaisons.

Respect-Within Pursuits, we will work collaboratively and cooperatively with one another as a team while recognizing and celebrating individual strengths, expertise and talents. We are an inclusive, open and affirming company. The contracted rate agreed upon between Pursuits and each Affiliate will reflect the respect our providers deserve.

Confidentiality - As stated in our ethical practice standards, strict confidentiality regarding clients within Pursuits must be maintained. In order for their names to be released to Pursuits Providers within network, clients will sign a Statement of Understanding and Agreement. Further, when working with groups, Pursuits Providers and Facilitators will explain to all members of the group that privacy of matters shared within the group must be maintained.

Integrity- Pursuits must rely on consistency of policy. Pursuits Providers will strive to conduct themselves in and outside of Pursuits with character, leadership and the highest standards of conduct. A breach of this agreement would serve as a reason for termination.

Timeliness in communication and attendance will be upheld and exemplified at all times when Providers are representing Pursuits in any manner.

Contractors Role Within Pursuits

Pursuits Functions -When attending, conducting, and/or facilitating any paid contracted service, fundraiser or community event as a representative of Pursuits, (including but not limited to Boulder Chamber functions or networking events) Providers will represent Pursuits exclusively. There will be no private programs marketed during this time. Pursuits business cards and name badges will represent each Provider as a Provider for Pursuits.

How Referrals Are Made: Referrals are generated by our referral sources, word of mouth, EAPs, social and written media, and through other Pursuits Providers. Requests for Assessments are made currently to the Pursuits main number 303.886.0272vor by website- pursuitsnetwork.com.

Sharla Macy will then proceed with the assessment and referral. Assessments regarding which Provider and/or service/specialization is appropriate for referral is based on the best interest and request of the client and a number of factors will be taken into account in making this determination. Providers from that point will be treated on a fair basis with referrals being generated evenly between providers within that given specialization. It is then the option of the provider to accept or turn down that given referral. Such Notice of Acceptance or denial of the referral must be made within 24 hours or the referral will be made to another contractor.

Authorization Process: Once a Provider is chosen and accepts the referral, the following will take place:

1. An authorization for service between Provider and Client or Provider and Service will be issued

Scheduling Appointments:

Once a referral to a Provider has been made, the Provider will contact the client to set the appointment. The client may be seen in the providers' own office..

How Contractors Are Paid:

Providers are paid through a contracted rate with Pursuits. They will be paid by submitting an invoice to Jill Fleishman via email by the last of the month to be paid the first week.

. Clients will pay prior or upon the time of service and the Credit Card information will be given at the time of the assessment.

A W9 will be required with a 1099 form generated at the end of the year regarding taxable work generated.

Ethical Conduct:

Pursuits is an open, diverse, affirming, non-discriminating company. It is a Safe Zone.

Pursuits is a "Green" company which will, to the best of its ability, utilize products that exemplify that value. This value should be represented on every level by use of re-useable, recyclable products and healthy organic snacks at Pursuits functions.

Communications:

Emails generated by Pursuits will be required to be acknowledged and/or answered on a 24 -48 hour turn-around. Timeliness and respect regarding this matter are essential for the flow and ease clarity of communication within the organization.

Pursuits Updates will be generated on a monthly basis.

Comment, Feedback and Grievances

We would love positive feedback and comments about things that are working well for you in Pursuits as well as specific recognitions toward all providers.

We welcome questions, and ways to make Pursuits even stronger. We need to work any grievance out in a timely, direct, collaborative and timely manner.