



APPWT WEB & AI SOLUTIONS

MICHIGAN, SINCE 1997

The AppWT Spiritual Director Business Manual

Spiritual Direction

Written by Anthony “Tony” Paris

AppWT Web & AI Solutions (AppWT LLC, a family company)



Spiritual Director Business Manual

Spiritual Direction

Written by Anthony “Tony” Paris

Published by AppWT Web & AI Solutions

AppWT LLC, a family company

Spiritual Director Business Manual

Spiritual Direction

Written by Anthony "Tony" Paris

AppWT Web & AI Solutions (AppWT LLC, a family company)

Second Edition, August 2026

© 1997-2026 AppWT Web & AI Solutions (AppWT LLC). All rights reserved.

Published in Livonia, Michigan, United States of America.

A NOTE ON SPELLING

This manual is read in the United States, Canada, the United Kingdom and Australia. Where a word is spelled differently in different countries, both spellings appear the first time the word is used, like color/colour. After that, one spelling is used so the page stays easy to read.

HOW TO USE THE TECHNICAL NOTES

Smaller italic notes marked *For your tech person* hold the deeper detail: exact settings, file names and commands. You can skip every one of them and the manual still makes complete sense. Hand them to whoever looks after your website.

IMPORTANT

This manual describes security practices that AppWT uses and recommends. It is written as general guidance for business owners. It is not legal advice, and it is not a guarantee that any system cannot be attacked. Security reduces risk. No honest provider will promise to remove risk entirely.

Every incident described in this manual comes from work AppWT actually performed. Client identities are deliberately withheld, because a client's security incident is not ours to publish. Where the business involved is AppWT itself, we name ourselves.

A Note From Tony

The call that started this book was booked as a website call. A spiritual director wanted a page that explained what she did. Half an hour in, she said the real thing out loud. Nine directees, a Tuesday that vanished every week, no agreement with anybody, no insurance she had ever read, and a suggested offering set six years earlier that about two thirds of people remembered. The page was not her problem.

We have been building and fixing websites for small businesses since 1997, and wellness and ministry practitioners have been a large part of that work for most of it. The same conversation keeps repeating. Somebody arrives with a marketing question, and underneath it sits a structure nobody has ever written down. A better page does not rescue a practice that is quietly running at a loss, and it certainly does not answer the question of what happens if a directee falls on your front step.

Spiritual direction needed its own manual for one reason above the others. It is a profession with almost no external structure. In most of the United States, Canada, the United Kingdom and Australia there is no government license/licence, no protected title and no registration board with statutory power. That means nothing is imposed on you, and it also means nothing is provided for you. Every boundary, every credential claim, every fee and every record has to be decided by the director and written down by the director. Nobody hands you that at the end of formation. So this book does.

Here is what we promise. Every chapter ends with something written down. An inventory of the practice you already have. A claims audit of everything you have published. A referral list with dates beside the names. A fee card with published tiers. A cost sheet for one real retreat. A source map. A ninety-day plan you sign. Every worked example uses figures the director supplied, in their own currency, from their own quotes and their own records. You will not find a going rate anywhere in these pages, because we have not seen your town, your tradition or the people who come to you.

Here is what we will not promise. We cannot promise you a full practice, because that depends on a local network we cannot see from Michigan. We cannot promise a retreat fills. This book is business information and it is not legal, tax or insurance advice. Chapters three, four, seven and thirteen all stop at the same place and send you to a licensed attorney, an accountant or a licensed insurance agent in your own jurisdiction. That is not caution for its own sake. Title rules, privacy law, reporting duties and confidentiality all differ by country and by state, province or territory, and several of them have moved more than once since 2024.

One boundary runs through the whole book, and we want it stated before you start. Spiritual direction is not counseling, psychotherapy, medical care or crisis support, and nothing here will help you claim otherwise. A director accompanies a person as they attend to their own inner life. Diagnosing, treating, curing and managing a condition belong to licensed health professionals. Chapter two gives you the exact words that keep a description honest, and it sits second in the book rather than tenth because a promise on a web page can lead a person to skip the care they actually need.

Work Part One first, in order, before anything else. Four chapters, one hour of counting, and no changes made yet. Directors want to skip it, because it asks for a spreadsheet and a policy document instead of a session. Skip it and every later decision gets made on a feeling. Do it and you will know what your practice costs to run, where your boundary sits, what your credentials actually evidence, and whether your insurance covers the room you sat in this morning. After Part One you can read out of order and go straight at whatever is in front of you.

This edition describes the work as it stands in 2026. Several things that were sound five years ago are not sound now. Recording a library of material once and selling it forever has been retired as a standalone plan for most independent practitioners, and chapter nine says what replaced it. Video sessions are ordinary rather than a substitute, which changes your insurance question and your privacy question at the same time. Where something is genuinely unsettled, such as what an artificial intelligence assistant says when somebody asks it for a spiritual director in a given town, we label it as emerging instead of pretending the answer is fixed.

Some of what you find here will not be comfortable. A suggested offering may turn out to be collecting from two thirds of the people it is offered to. A retreat may need to be canceled while there is still time to refund everybody properly. A page you have been proud of may contain a claim that has to come down. Those are ordinary outcomes and this book treats them that way. What matters is that you decided with numbers in front of you and a date written beside the decision.

One last thing. Your formation, your supervision, your directees' trust and your own name belong to you, whatever room or institution you happen to work in this year. Retreat houses change hands, congregations restructure, and a good director outlasts both. Every page here is written so you can do the work yourself, or hand a short list to somebody who helps you, and still check the result.

Anthony P. Paris and Rev. Michael Allison

AppWT Web & AI Solutions · Livonia, Michigan

How to Use This Manual

This manual is built to be worked with a pen in your hand. Keep one folder, on paper or on screen, and put every output in it as you go. Thirteen chapters produce thirteen documents, and the last chapter turns them into a single plan with dates on it.

The parts

Part One settles the ground you stand on. Chapter 1 counts what your practice already is, in three lists on one page. Chapter 2 draws the line between direction and licensed care, gives you the language for a website, an agreement and a live conversation, and builds the referral list before the night you need it. Chapter 3 sorts out what a formation certificate, an association membership and ongoing supervision each actually evidence, and gives you a method for verifying title rules where you work. Chapter 4 puts an entity, an insurance policy, a signed agreement and a records position underneath everything.

Part Two is the money and the mechanics. Chapter 5 turns your income into a real hourly return and shows what the offering model does to a practice that depends on it. Chapter 6 builds a fee from your own costs and publishes a sliding scale instead of negotiating one at the door. Chapter 7 automates scheduling, reminders and payment, and asks which privacy rules follow your directee. Chapter 8 costs a quiet day or a retreat before the house is booked, and writes the underfill plan first. Chapter 9 prices group direction and says which online offerings still sell in 2026.

Part Three is about being found and staying in the work. Chapter 10 maps where directees actually come from and builds two-way referral relationships. Chapter 11 builds the page a seeker reads at eleven at night and sets a monthly ten-minute check on what search results and assistant answers say about you. Chapter 12 sizes a writing and speaking rotation you can keep for a decade, with the absolute line on using a directee's material. Chapter 13 sets six measures, a capacity ceiling, an annual calendar, a custodian plan and a ninety-day plan you sign.

The boxes, and what each one means

DO THIS TODAY

A gold box is one action you can finish now. If you only ever act on the gold boxes, you will still be far safer than when you started.

FROM OUR FILES

A dark box is a real incident from AppWT work. Nothing in these boxes is invented. Where a detail was never verified, we say so rather than fill the gap.

FOR YOUR TECH PERSON

A smaller italic note like this one carries the professional detail: exact file names, headers, settings and commands. Skip every one and the manual still reads completely. Forward them to your web person.

The sheets, the tables and the two code blocks

There is almost no code in this book. The two code blocks are column headings for documents you build yourself: the section headings of a direction agreement, and the retreat cost sheet. Type them into any word processor or spreadsheet you already use. The technical notes are short and practical, covering things like video platform settings, payment provider questions and four checks you can run on your own website. None of it is about how a page looks, because the color/colour scheme of a site matters far less than whether it answers six plain questions and states an enrollment/enrolment date somebody can put in a calendar. Skipping a technical note never breaks a chapter. Hand it to whoever helps with your site, then check the result yourself.

Where to find the resources this book points at

This manual names categories rather than products, on purpose, because a named tool changes its terms and its price faster than a book can be reprinted. Where you need something, the category is what to search for: a professional association in your own tradition and country, a formation program with supervised practice hours, a supervisor accredited by a body you can name, a payment provider that supports stored cards and recurring charges in every country you work into, a form provider that encrypts submissions rather than emailing them in plain text, a scheduling tool that sends reminders automatically, and an accountant and an attorney who both work in your jurisdiction. AppWT publishes companion titles on website performance, local visibility, email and payment integration, and this book points at them rather than repeating them badly.

What this book does not promise

No income figure and no number of directees is promised, because both depend on a local network we have not seen. Nothing here is legal, tax or insurance advice, and several chapters stop and say so. This is not a manual on how to give direction either, so you will find no method, no discernment framework and no theology in it. Your formation gave you those, and a book that tried to replace them would be doing you harm.

If you only have one afternoon

Do five things, in this order. Email your insurer a list of everything you actually do, including sessions in your home, sessions by video and the countries your directees live in, and ask in writing which of those the policy answers for. Read your own website against the phrase table in chapter two and take down anything that names a condition or promises an outcome. Write a fee card with a published reduced tier and put it on a page with the word fees in the menu. Turn on automatic reminders and a payment method that works without you. Then write down two names per category on a referral sheet and put today's date beside each. All five are cheap, all five are quick, and between them they close the gaps that cost directors the most.

Where to keep the outputs

Keep one folder and treat it as part of the practice. The inventory, the claims audit, the referral sheet, the agreement, the fee card, the cancellation policy, the cost sheets, the source map, the measures page and the custodian plan all live in it, each with a date on the front. Put every renewal on one calendar rather than several, because insurance, entity filings, tax dates, association membership and your records deletion run all come due in the same year. Keep the old versions too, since last year's sheet is what tells you whether this year's decision worked.

Contents

PART ONE *The Ground You Stand On*

1	The Practice That Grew Without Anyone Deciding It Would	2
2	The Line Between Direction and Care	7
3	Formation, Credentials and the Supervision You Do Not Skip	13
4	Entity, Insurance and the Agreement That Has to Hold	18

PART TWO *The Money and the Mechanics*

5	What an Hour of Direction Actually Costs You	24
6	Setting a Fee You Will Not Cut at the Door	29
7	Booking, Intake and Getting Paid Without Chasing	35
8	Quiet Days and Retreats: Breakeven Before You Book the House	41
9	Online Direction, Groups and What Still Sells in 2026	47

PART THREE *Being Found, and Staying in the Work*

10	Where Directees Actually Come From	54
11	The Page a Seeker Reads at Eleven at Night	59
12	Writing, Speaking and the Slow Authority	64
13	Six Measures, a Ceiling, and a Practice You Can Still Do in Twenty Years	69
	One-Page Checklist	75
	Glossary	80
	About AppWT	84

A dark, monochromatic illustration. On the left, a computer monitor is shown from a three-quarter perspective. A thick metal chain is wrapped around its front, secured by a large padlock. The monitor's screen displays a simplified web browser interface with a back arrow, a search bar, and a hamburger menu icon. To the right of the monitor, a small, stylized figure wearing a hooded sweatshirt is running towards the right side of the frame. The background is dark and indistinct.

PART ONE

The Ground You Stand On

Direction practices accumulate one yes at a time, so almost nobody has written down what theirs already is. These four chapters count the practice, draw the line between direction and licensed care, settle what your formation and supervision actually evidence, and put an entity, an insurance policy and a signed agreement underneath the work.



The Practice That Grew Without Anyone Deciding It Would

Chapter 1. Counting what your direction practice already is, before you change one thing about it

Most spiritual direction practices are not built, they accumulate. This chapter counts what yours already holds, names the four things that changed in the work between 2019 and 2026, and gives you a one-page inventory of every directee, every hour and every place a person found you.

Nothing gets changed yet, and that is deliberate.

It started with two people. Someone from the parish asked for an hour a month, and then a friend of that person asked for the same thing. Nobody signed anything. There was no fee, or there was a suggested offering that some months arrived and some months did not. Four years later there are nine regular directees, a waiting list of three, two people who stopped coming and never said why, and a Tuesday that is gone before it starts. There is no agreement, no cancellation policy, no insurance, and no separate bank account. The work is good. The practice underneath the work does not exist.

That is the ordinary shape of a spiritual direction practice, and it is not a character failing. Direction grows out of relationship. It arrives one person at a time, usually through a request rather than an advertisement, and each yes is small enough that nobody stops to add up the pile. This chapter adds up the pile. By the end you will have a written inventory of every person you currently see, every hour the practice consumes in an ordinary month, and every route a directee took to reach you. You will change nothing in chapter one. You will simply know what you have, which is the only foundation the next twelve chapters can stand on.

Four Things That Are Different in 2026

A practice built on how the work behaved ten years ago will misfire now. Four shifts matter, and each one changes a decision later in this book. Take them as conditions to plan around, not as complaints.

1. Sessions by video are now ordinary rather than a substitute. A directee may live three time zones away and never sit in your room, which changes your insurance question, your intake form and the jurisdiction your agreement has to name.
2. Formation programs have multiplied and vary widely in length, method and cost. A credential from one says something different from a credential from another, and a directee cannot tell them apart from the outside.
3. The route people take to find a director has moved. Fewer arrive through a single parish or congregation, and more arrive through a search, a directory listing, a podcast, or an answer produced by an artificial intelligence assistant that assembled it from public pages.
4. Money is discussed more openly than it once was. Directees increasingly expect a published fee, a written cancellation term and a card payment, and a practice that offers none of those reads as unfinished to a person who is otherwise ready to commit.

None of these four removes the older routes. Congregations still refer. Retreat houses still keep a list. A person still hears your name from a friend and calls. The change is that the older routes no longer carry the whole practice, so a director who does nothing but wait for referrals is depending on a channel that has quietly narrowed. Chapter ten deals with that directly. For now, just record which route each current directee actually took, because you will need the real answer and not the one you assume.

The Inventory: Three Lists on One Page

Take one page, on paper or on screen, and build three short lists. This is the only homework in the chapter and it takes about an hour. Do it before you read chapter two, because chapter two asks a hard question about the people on list one, and the question is easier to answer when the names are already in front of you.

LIST	WHAT GOES IN IT	WHY YOU NEED IT LATER
Every current directee	Name, how often you meet, session length, what they pay and how, the month they started, and whether anything is written down between you.	Chapters four and six turn this into agreements and a fee card. The blank cells are the work.

LIST	WHAT GOES IN IT	WHY YOU NEED IT LATER
Every hour the practice takes in an ordinary month	Session time, preparation, the settling time before and after, notes, scheduling messages, travel, supervision, your own ongoing formation, and admin.	Chapter five divides your money by these hours. Missing hours make the practice look better paid than it is.
How each person arrived	The actual first contact: a named person who referred, a retreat, a directory, your own site, a talk you gave, a search, or a source you genuinely cannot reconstruct.	Chapter ten builds on the routes that already work. Guessing here sends the whole plan the wrong way.

WRITE "UNKNOWN" RATHER THAN A GUESS

The third list is the one people quietly fabricate. If you cannot remember how somebody found you, write unknown and move on. A list with four honest unknowns in it is useful. A list where the unknowns have been filled in with plausible guesses will point you at a referral source that never existed, and you will spend a year cultivating it.

The second list is the one that surprises people, so be generous with it. An hour of direction is rarely an hour of work. There is the reading of your own notes beforehand, the quiet you keep before the person arrives, the arrival and settling, the session, the closing, the note you write afterward, and the message two days later rearranging next month. There is the supervision hour you owe the practice, the formation you keep up, and the reading that is not leisure. Add travel if you go to them or to a borrowed room. Count all of it now, roughly, and count it the same way for every directee. You will do this properly in chapter five. Right now you only need the order of magnitude, because most directors are carrying about twice the hours they would have named from memory.

NINE DIRECTEES, TWENTY-TWO HOURS, AND NO IDEA UNTIL IT WAS WRITTEN DOWN

A director in her fifth year of practice believed she spent about nine hours a month on direction, because she saw nine people for an hour each. She kept the inventory for one ordinary month and totaled it honestly. Nine session hours became twenty-two once she added preparation, the quiet she kept before each session, notes written afterward, scheduling messages, one supervision hour, and the drive to a borrowed room for the three people she did not see at home. Her offerings that month came to a figure she had never divided by anything. Divided by twenty-two, the result was under half what she had assumed, and about a third of it arrived from people who paid irregularly. She changed nothing that month. She simply had, for the first time, a number that made the next four decisions obvious, and a written record to compare against a year later. The figures were hers, not a market rate, and yours will be different.

What This Book Will and Will Not Do

This is a business manual for people who accompany others. It is not a manual on how to give direction, and it contains no method, no discernment framework and no theology. Your formation gave you those, and a book that tried to replace them would be doing you harm. What this book supplies is the structure the work sits inside: the boundary, the credential, the entity, the insurance, the agreement, the fee, the booking system, the retreat costing, the online delivery, the referral network, the page a stranger reads, and the annual review that keeps you in the work for twenty years instead of five.

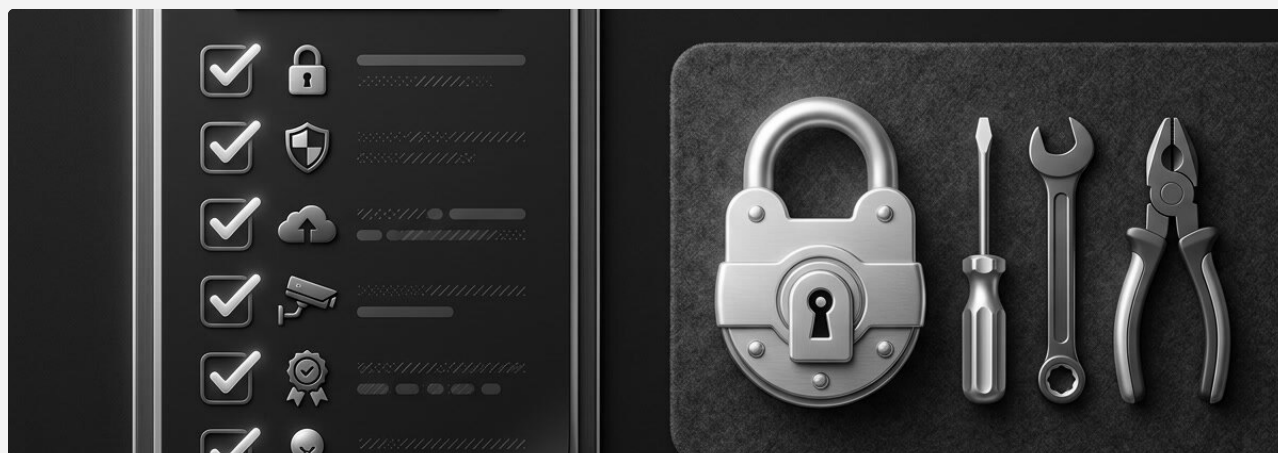
It is also not legal, tax or insurance advice, and it will stop and say so in the chapters where that matters. Rules on business entities, professional titles, record keeping and personal data differ across the United States, Canada, the United Kingdom and Australia, and they differ again by state, province and territory. Several of them have moved more than once since 2024. Where a rule is a rule, this book tells you how to verify it in your own jurisdiction and who is qualified to confirm it. It never prints a rule as settled fact and then leaves you to discover it changed.

| You cannot organize/organise a practice you have never written down.

One last thing before you move on. Nothing in the inventory is a verdict on your ministry. A practice with no agreements and no fee card is not a bad practice. It is an unfinished one, and the unfinished parts are all things that can be written in an afternoon each. Keep the page you just built. Chapter two takes the first list and asks what you are actually offering each of those nine people, which is a question about scope rather than about money, and it is the question that has to be settled before the fee, the insurance or the website makes any sense at all. Put the page in a folder, date it, and center/centre the rest of the book on it.

WHAT TO REMEMBER

- A direction practice usually accumulates one yes at a time, so nobody has ever added up what it costs to run.
- Four conditions changed the work by 2026: video sessions are ordinary, formation programs multiplied, referral routes widened, and directees expect published terms.
- Build three lists on one page: every current directee, every hour an ordinary month consumes, and how each person actually found you.
- Write unknown instead of a guess on the referral list, because a fabricated route sends a year of effort the wrong way.
- Session hours are usually about half the real hours once preparation, notes, admin, travel and supervision are counted.
- This manual covers the structure around the work, never the method of direction itself, and it is not legal, tax or insurance advice.



The Line Between Direction and Care

Chapter 2. Scope of practice, the words that keep it honest, and the referral you make before you need it

A directee describes a symptom, and the room changes shape. This chapter draws the line between spiritual direction and licensed care, gives you the exact language for a website, an agreement and a live conversation, and builds the referral list before the night you need it. It closes with a claims audit of everything you have already published.

Forty minutes into a session, a directee says she has not slept properly in two months, that she cannot see a point to the week, and that she has been told before that she has an anxiety condition. She asks whether the practice you have been doing together will fix it. You have known her for a year. She trusts you, she is in front of you, and the honest answer is not the one she wants. What you say next matters more than anything else in this book, and it is the reason scope of practice comes second rather than tenth.

The line itself is not complicated. A spiritual director accompanies a person as they attend to their own inner life and their relationship with what they hold sacred. A spiritual director listens, notices, asks, and holds silence. A spiritual director does not diagnose a condition, does not treat one, does not manage one, and does not offer an outcome. Those belong to licensed professionals, and the license exists because getting them wrong causes real harm. Stating the line plainly in writing protects the directee first and you second, in that order.

Three Rooms, Three Jobs

It helps to see the neighboring work clearly, because directees routinely arrive not knowing which one they are asking for. Describe the differences without ranking them. None of the three is superior, and a person may hold all three at once.