

Coaching Guidelines & Agreement

I have positive expectations for a coaching relationship that helps you to create the life you want to live. To partner together professionally and successfully, I want you to be familiar with the following guidelines and agreements.

I invite you to think of Coaching as a process. Many people create change for themselves in a short time. However, to refine and sustain the change takes several months. Although not binding, I would ask that you expect our Coaching relationship to last at least 3 months.

As your coach, I want to help you grow, change, develop, and achieve your life goals. While I will challenge you to live out your values and reach your potential, our relationship starts with your agenda, your values, and your initiative. You are responsible for your life, and you will make the choices about what actions to take and what we work on together. I'm excited about partnering with you in this journey.

This document constitutes a contract between us ("Coaching Agreement"). You should read it carefully and raise any questions and concerns that you have before you sign and submit your agreement. In this agreement "I" and "coach" refers to YOUR NAME, "you" and "client" refer to YOUR CLIENT NAME.

My role as your coach:

I agree to serve as your Coach - to partner with you to identify and achieve your personal and/or professional goals. As your Coach, I cannot guarantee results. You will create powerful results by having the courage and determination to forward the action in your life.

As your Coach, my job is to help you to take information and skills that you already have and (1) to make decisions about which changes you would like to achieve (including list of coaching targets/goals), (2) to develop a personal "action plan" in order to make those changes, (3) to implement your action plan and make the behavioral changes, and (4) to develop strategies to maintain the changes you have made. I will support, encourage, teach, and help you to stay "on track" toward your goals.

During the time we spend together in our coaching sessions, I will devote my time, thoughts, and energy to you, exclusively. In between our sessions, I may not be instantly available, as I may be attending to others, or myself. I will however, always attempt to be available within 48 hours.

I am a Coach, not a psychotherapist or physician, and I am not trained in diagnosing psychological or medical conditions. If any issues come up for you that should be handled by a licensed therapist or physician, I insist that you must attend to your health by contacting the appropriate professional.

As your Coach, I will bring attentive listening, understanding, belief in you and commitment to your success. You can expect me to challenge you, offer fresh perspectives, make requests (including assigning homework), acknowledge your wins, and guarantee utmost confidentiality (to the fullest extent of the law, and so long as I don't fear for your or another's safety) in the powerful, sacred relationship.

Your role as my client:

To be successful requires your commitment as the client to taking responsibility for the process and the outcomes that result. You'll need to be open and honest about your issues and needs, keep agreements and stay committed to your goals.

As a client you will be motivated and committed to taking action on your determined personal and professional goals. You realize that anything less than your intentional full participation may not lead to the success you desire.

Terms of Coaching:

The services provided include coaching on topics decided jointly with you, the client. The purpose of coaching is to develop and implement strategies to help you reach personally identified goals of enhanced performance and personal satisfaction. Coaching may address a wide variety of goals including specific personal projects, life balance, relationship satisfaction, job performance and satisfaction, or general conditions in the client's life, business, or profession.

You accept full responsibility for yourself and any actions you take that might result from Coaching. You are under the care of a physician and healthy enough to engage in coaching. You understand that coaching results cannot be guaranteed and agree to hold the coach free of all liability and responsibility for any actions or results from adverse situations created as a result of our coaching relationship.

Nature of Relationship:

You understand that the coaching relationship is not psychotherapy, psychological counseling, or any type of therapy; nor is it a substitute for these services. In the event you feel the need for professional counseling or therapy, it is your responsibility to seek a licensed professional who can provide these services. If I believe that such services would be valuable to you, I will recommend them and may suspend our coaching relationship until services have been initiated and clearance is granted from said professional.

You, the Client, set the agenda for your coaching, and your success will depend on your willingness to define and take risks and try new approaches. You can expect your Coach to be honest and direct, asking straightforward questions and using challenging techniques to help you move forward. You are expected to evaluate your own progress, and if the coaching is not working as you wish, you should immediately inform me so we can both take steps to correct the problem. Like any human endeavor, coaching can involve feelings of distress and frustration which accompany the process of change. Coaching does not offer any guarantee of success.

It is also important to understand that Coaching is a professional relationship. While it may feel at times like a close personal relationship, it is not one that can extend beyond professional boundaries. Considerable experience shows that when boundaries blur, the hard-won benefits gained from the coaching relationship are endangered.

Payment Procedure:

Payment is required in advance of each series of coaching calls. The first coaching session will begin after this agreement is signed and faxed/mailed or electronically sent to the coach, and the first payment is received by credit/debit card (Visa, MC, Amex) utilizing PayPal or by check. Services must be paid in advance, or they cannot be provided. Any changes to this procedure must be mutually agreed upon in writing.

This agreement between the coach and the client will consist of two sessions of 50 minutes per month. The monthly fee for the two sessions is \$XXX , paid in advance and due on the first of the month. Please make checks payable to XXXX and mail to this address XXXXXXXXXX.

We are committed to working together for one month, and will continue in a month to month agreement, there is no commitment beyond month to month, but I do require a two week written (email is acceptable) notice if you think you will be ending our coaching together.

Please note that a "month" may not always correspond to a calendar month, but refers to one set (two sessions) of coaching appointments, that usually takes about a month to complete.

Your monthly coaching includes: 2 scheduled bi-weekly calls per month (or other call frequency per special arrangement), each for 50 minutes.

Also, for additional support up to 2 e-mails between sessions; and up to 2 short (5-10 minute) calls as needed to report emergent problems or successes. I'm happy to provide this extra level of service at no additional charge. When you call will often reach my voicemail, as I am frequently busy with calls or with life! Email is often the fastest way to reach me, as I check it frequently.

Call Procedure:

Day and time of our sessions will be mutually selected. We agree to be diligent and punctual so that we make the most of our time together.

Please respect yourself and our time together by finding a quiet place where you won't be distracted. Avoid talking in the car, in public places, or with friends or family nearby as you are not able to come fully present and without agenda in these situations.

I will call you at the pre-arranged time and telephone number as scheduled. There are no additional fees for this call. If you elect to instead call me, then you assumes all fees associated with the phone call. For group coaching calls and classes, I will pay for the teleconference line; and you will pay for the call into the conference line.

Cancellations:

Please remember, cancellations must be made 24 hours in advance via telephone and confirmed by e-mail. If you do not show up for a scheduled call, for any reason, and provide no notice we will not make up that time and you will be charged. There will be no refund or credit for cancellations made less than 24 hours prior to a scheduled session. I will make reasonable efforts to reschedule sessions that are cancelled in a timely manner.

If you do not answer the phone during a scheduled time, I will call again 5 minutes into your session if I am not able to reach you I will leave a message and follow up with an email asking you to initiate next contact.

If you have an emergency or illness, you can reschedule with less than 24 hours notice. If I need to reschedule, I will give you at least 24 hours notice as well, barring an emergency or illness. You have already been informed that I am a caregiver for a leukemia/bone marrow transplant survivor which at times involves medical emergency of which are always first priority - although rare - appointment changes may be necessary with very short notice.

Challenges:

If I ever say or do anything that upsets you or doesn't feel right, please bring it to my attention so that we can resolve it as soon as possible. My objective is to have a coaching relationship that is fully open, honest, real and trusting in our communication styles. We should both realize that communication via telephone or email entails extra challenges, therefore we give each other plenty of latitude, and promptly ask for clarification if there is a miscommunication.

If, at any time, you feel that your needs are not being met or you are not getting what you want out of the coaching, please tell me, so we can discuss your experience and adjust your coaching program, as needed.

Confidentiality and Mutual Nondisclosure:

We mutually recognize that we may discuss future plans, business affairs, customer lists, financial information, job information, goals, personal information, and other private information. I will not voluntarily communicate your information to a third party. In order to honor and protect my intellectual property, you likewise agrees not to disclose or communicate information about my practice, materials, or methods to any third parties.

As a coach, I protect the confidentiality of the communications with my coaching clients. I will only release information about our work to others with your written permission, or if I am required to do so by a court order. There are some situations in which I am legally obligated to breach your confidentiality in order to protect others from harm, including, (1) If I have information that indicates that a child or elderly or disabled person is being abused, I must report that to the appropriate state agency and (2) if a client is an imminent risk to him/herself or makes threats of imminent violence against another person, I am required to take protective actions. These situations rarely occur in coaching practices, but if such a situation does occur, I will make every effort to discuss it with you before taking any action.

As you are probably aware, it is nearly impossible to protect the confidentiality of information which is transmitted electronically. This is particularly true of e-mail and information stored on computers connected to the internet (unless you use encryption and other forms of security protection), and if you use a cordless or cell phone, someone with a scanner could hear you talking, you should take this into consideration when choosing your methods of communication.

Many sessions are conducted in teleconference groups. You agree to maintain the confidentiality of all information communicated to you by other coaching clients and by your

coach. I also understand that progress is often enhanced when clients discuss their coaching relationship with trusted colleagues and friends. You can have these discussions, but you are expected to be very careful not to share any information that would allow others in the group to be identified. One way to decide how and what to discuss is to think about how you would feel if someone else in the group was discussing you.

Dispute Resolution:

Any controversy or claim arising out of or in relation to this agreement, or the breach of this agreement, shall be settled by arbitration, which will occur via telephone by an mutually agreed upon arbitrator. The costs of the arbitration shall be borne by the losing party.

As an ICF credentialed coach I am bound to abide by the ICF Ethical Principles and Code of Ethics, should you want to familiarize yourself with them, they are found here:
<http://www.coachfederation.org/ethics/>.

I have read and agree with the Coaching Guidelines and the Coaching Agreement.