

This proposal is prepared for a coaching partnership between (*Coach name*) and (*Client name*) to identify the following information and expectations to enhance the coaching relationship over the course of its duration.

# **Agenda & Goals**

The focus of this coaching relationship is to help (*Client name*) with the following (*scope, topics, and desired outcomes*):

# **Meetings**

Meetings will occur (*twice a month? other?*) by (*phone? Zoom? other?)* for (*4 months? other?*) and then be evaluated for continuance beyond that time. Meetings will take place on a day and time that is convenient to both of us.

# **Contact Info**

Coach email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Coach phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Coach LinkedIn profile: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# **Coach and Client Commitments & Expectations**

* Be on time for appointments
* Give advance notice when needing to reschedule
* May terminate the relationship at any time for any reason

# **Coach Commitments & Expectations**

* Ask excellent questions, listen skillfully and compassionately, and assist the client in setting measurable goals for progress
* Facilitate a process in which the client sets the agenda and takes responsibility for their own (the client’s) awareness and actions
* Maintain confidentiality except when legally required to report or when imminent harm to the client or others is suspected

# **Client Commitments & Expectations**

* Give honest feedback to the coach about what is helpful and unhelpful along the journey
* Prepare in advance for each coaching session by following through with assignments
* Take responsibility for their own awareness and actions, and make efforts to implement action steps accordingly

# **Length of Commitment/Fees**

Coaching will occur for the time period stated above and be re-evaluated if additional sessions are needed. Please note that you may terminate the coaching sessions anytime you feel that there is no beneficial reason to continue. The fee for this coaching experience is (*$$ per month*). You can start your coaching sessions by clicking the “**Purchase**” button on my website coaching package (<https://www.integernetwork.com/coaches>) that you are interested in. Any additional assessment or resources costs will be incurred separately. Ruth Yoder (ruth@integernetwork.com), our Integer Financial Administrator, will send you an invoice at the end of each month based on the sessions which have occurred.

Please let me know if you have any additional questions. I look forward to working with you.

Thank you,

*Coach name*

*Credentials & Certifications*

# **Coaching Disclaimer & Waiver**

All coaching services and communication, email or otherwise, delivered through Integer Network are meant to help you identify the areas in your life and in your thinking that may be standing in your way.

This agreement is for coaching, not psychotherapy. While coaching can work with issues such as identifying and reaching life goals and changing the behaviors that aren’t working well for you, coaching cannot deal with issues such as depression and anxiety. For issues such as these, you must see a Physician or Licensed Mental Health Professional in your location. Your coach will not diagnose or treat any medical or psychological conditions.

While your coach may be licensed as a healing arts practitioner he or she is not functioning as a licensed practitioner when offering coaching services. By signing this agreement, you are agreeing that you understand the difference in these two functions and you will get appropriate professional help for mental health issues if necessary.

I understand and agree that I am fully responsible for my well-being during my coaching sessions, and subsequently, including my choices and decisions. I understand that coaching is not a substitute for counseling, psychoanalysis, mental health care or substance abuse treatment, and I will not use it in place of any form of therapy.

I understand that all comments and ideas offered by my Coach are solely for the purpose of aiding me in achieving my defined goals. I have the ability to give my informed consent, and hereby give such consent to my coach to assist me in achieving such goals. I understand that to the extent our work together involves career or business, my Coach is not promising outcomes included but not limited to increased clientele, profitability and or business success.

Please free to ask questions at any time about your coach’s background, experience and professional orientation.

**Appointment Scheduling and Cancellation Policies** - To cancel or reschedule an appointment, you are expected to notify your coach at least 24 hours in advance of your appointment. If you do not provide at least 24 hours’ notice in advance, you are responsible for payment for the missed session.

**Coach Availability and Emergencies** - In the event of a medical emergency or an emergency involving a threat to your safety or the safety of others, please call 911 or the appropriate emergency service to request assistance. Your coach is not licensed to handle these matters.

**Confidentiality** - All information obtained in the course of the professional service is confidential unless there is a compelling professional reason for its disclosure. Your coach will disclose confidential information without a specific release if it is necessary to prevent foreseeable imminent harm to the client or another. In all circumstances, coaches will be judicious in the amount of information that is disclosed. Coaches may disclose confidential information without the consent of the client only as mandated or permitted by law. When possible, coaches inform clients about the disclosure of confidential information and possible ramifications before the disclosure is made. Coaches will only disclose confidential information to third parties with the appropriate written consent. Coaches must disclose certain confidential information as required by law or if the confidential information may put the client or others at risk of harm or compromise their well-being.

I understand that my Coach will protect my information as confidential unless I state otherwise in writing. If I report child, elder abuse or neglect or threaten to harm myself or someone else, I understand that necessary actions will be taken and my confidentiality agreement limited in this capacity. Furthermore, if my Coach is ordered by a court to provide information or to testify, he or she will do so to the extent the law requires.