

Heart's Adventure

Life & Relationship Coaching for Your Life's Journey

THE COACHING AGREEMENT

Welcome to Heart's Adventure, a professional Coaching practice. This document and attachments constitute a contract between you and Glen McClintock, your life and relationship coach. You should read this agreement carefully and raise any questions and concerns that you have before you sign it.

Services:

The services provided by Heart's Adventure include Coaching or TeleCoaching 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 specific personal projects, life balance, job performance and satisfaction, or general conditions in the client's life, business, or profession. Coaching uses personal strategic planning, values clarification, brainstorming, motivational counseling, and other counseling and consulting techniques.

Payment Procedure:

Coaching fees are described on the attachment, "Coaching Fee Plan". Please choose the plan that best fits your needs and your schedule, sign the Plan, and include it with this Agreement.

The Coach is paid in advance of each series of coaching calls. The first coaching session will begin after this agreement is signed and faxed to the Coach and the first payment is received by credit/debit card (Visa, MC, Amex) or check. Services must be paid for in advance, or they cannot be provided. Services requested by the Client, in addition to coaching calls, will be billed at a prorated hourly rate (agreed in advance) and will be paid within 30 days of service. Any changes to this procedure must be mutually agreed upon in writing.

Feedback:

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 or training group, please tell me, so we can discuss your needs and adjust your coaching program, as needed. We will continue to work on the goals that you define unless you want to stop, which we will do whenever you ask.

Session Time:

Coaching is scheduled at the mutual convenience of the Coach and the Client. The day and time for the next call will be scheduled at the close of each coaching session.

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Call Procedure:

The Client will call the Coach at the pre-arranged time and telephone number as scheduled, and pays the telephone charges for the call. For group coaching calls and classes, the Coach will pay for the teleconference line, and the Clients will pay for the call into the conference line.

Cancellations:

Please remember that you must give 24 hours prior notice if you need to cancel or change the time of an appointment, otherwise you will be charged for the session in full. The Coach will make reasonable efforts to reschedule sessions, which are cancelled in a timely manner.

Termination:

Either party may end the coaching relationship by providing the other party with a one-week written notice, which may be transmitted by email or fax.

Confidentiality:

As a licensed therapist, I protect the confidentiality of the communications with my clients, including 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.

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

As you are probably aware, it is impossible to protect the confidentiality of information that 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

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cell phone, someone with a scanner could hear you talk.

Coaching and Psychotherapy:

In addition to being a Coach, I am also a licensed therapist in the State of Vermont and California with training and experience in diagnosing and treating emotional and psychological problems. Although there are some similarities between Coaching and psychotherapy, I will not conduct psychotherapy with my coaching clients. These are different activities, and it is important that you understand the differences between them. Although both Coaching and psychotherapy use knowledge of human behavior, motivation, behavioral change, and interactive counseling techniques, there are major differences in the goals, focus, and level of professional responsibility.

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 make (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 stay "on track" toward your goals.

You, as 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 your Coach 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.

Psychotherapy, on the other hand, is a health care service. Its primary focus is to identify, diagnose, and treat nervous and mental disorders. The goals include alleviating symptoms, understanding the underlying personality dynamics that create symptoms, changing the dysfunctional behaviors, which are the result of these disorders, and developing helping patients to cope with their psychological problems. It is usually reimbursable through health insurance policies (while coaching is not, at present).

Psychotherapy patients are often emotionally vulnerable. This vulnerability is increased by the expectation that they will discuss very intimate personal information and will expose feelings about themselves that are understandably sensitive about. The past life experiences of psychotherapy patients have often made trust difficult to achieve. These factors give psychotherapists greatly

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disproportionate power that creates a fiduciary responsibility to protect the safety of their clients. The coaching relationship is designed to avoid this power differential.

Because of these differences, the roles of Coach and psychotherapist are often in potential conflict, so I believe that it is ethically inappropriate, under most circumstances, for me to play both roles with a client. If I am your Coach, I cannot be your therapist. This means that if either of us recognizes that you have a problem that would benefit from psychotherapy, I will refer or direct you to appropriate resources. In some situations, I may insist that you enter psychotherapy and that I have access to your psychotherapist, as a condition of my continuing as your Coach.

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, either during or after our work together. Considerable experience shows that when boundaries blur, the hard-won benefits gained from the coaching relationship are endangered.

Mutual Nondisclosure

The Coach and Client mutually recognize that they may discuss future plans, business affairs, customer lists, financial information, job information, goals, personal information, and other private information. The Coach will not voluntarily communicate the Client's information to a third party. In order to honor and protect the Coach's intellectual property, the Client likewise agrees not to disclose or communicate information about the Coach's practice, materials, or methods to any third parties.

Dispute Resolution

Any controversy or claim arising out of or relating to this agreement, or the breach of this agreement, shall be settled by arbitration, which will occur via telephone by an arbitrator that we mutually agree upon. The costs of the arbitration shall be [shared equally] [borne by the losing party].

Your signature below indicates that you have read the information in this document ("Coaching Agreement and Informed Consent) and any Attachments, such as the Coaching Fee Plan, and agree to abide by its terms during our professional Coaching relationship.

Client _____ Date _____

Coach _____ Date _____

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Coaching Fee Plan

Life coaching is available for 200 per month and a three month commitment is required. Calls are for 30 minutes three times per month. Your coaching agreement also includes unlimited emails.

Payment is due, in advance each month, for scheduled calls. Please make checks payable to Glen McClintock and mail to:

Heart's Adventure
21 Franklin Street
Barre, Vermont 05641

Also, you may use Mastercard or Visa:

I agree to have my credit card debited in the amount of \$200 (\$300 for Relationship Coaching) per month for coaching services that include three 30 minute phone calls and unlimited emails. I agree to have my credit card debited for each subsequent group of three calls (30 minutes each) as long as our coaching relationship continues (unless I notify you to stop or modify this arrangement).

MC/VISA Card Number _____ Exp. _____

Name As On Card: _____

Billing Address: _____

Signature; _____ Date _____

{Please keep this invoice as your credit card receipt and fax this completed form to (802) 479-0164

Member of International Coaching Federation

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What is coaching?

Coaching is the process of bringing out the greatness of people. It begins with a desire on the part of the client to accomplish, have or experience something. The coach inspires the client to accomplish the desired result through personalized teaching, expanding awareness and designing environments.

Why does coaching work?

Coaching works when there are two factors present: 1) The client is willing to grow, and 2) There is a gap between where they are now and where they want to be. Successful coaching clients know the value of sharing ideas with someone who understands them and is subjective enough not to want a lot for them, yet objective enough not to be biased or self-serving. Just talk about options with someone who can listen, is often enough to have it all become very clear.

Coaching works because of three unique features: **SYNERGY**: Client and coach become a team, focusing on the client's goals and needs and accomplishing more than the client would alone. **STRUCTURE**: With a coach, the client takes more actions, thinks bigger and gets the job done, thanks to the accountability the coach provides. **EXPERTISE**: The coach knows how to help business people make better decisions, set the best goals, develop new skills for communicating and restructure their professional and personal lives for maximum productivity.

How do the coaching sessions work?

Coaching is usually done over the phone. In addition to allowing us to have frequent, regular contact, it makes it easy to stay in the "coaching relationship", since the client can call from their office, home, car or hotel. The person coached completes a coaching call strategy form prior to each call, describing the current challenges and the progress they've made since the last call. I work on a coaching retainer, which means you will be coached for three half hour pre-arranged sessions monthly, with the ability to make brief 5-10 minute touch-ins via phone and unlimited email between sessions. The focus of the call is determined by you, the client. The coach clients solve the problems and make the most of the opportunities. When they are missing a principle or distinction, we draw one so they can see a whole lot better. When they are taking on a large goal, we help them design and project and provide the support and structure needed to make sure it gets done. We bring out the clients best by offering advice, expecting a lot, helping them strategize and celebrating the wins. There is often "fieldwork", where the client is given a formula, new perspective or a challenge to try something in a new way. That forms the basis for the next call.

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What happens when you begin a contract with a coach?

You take yourself and what you want more seriously. You take more effective and focused actions immediately. You stop putting up with stuff that gets in your way. You create momentum to achieve more, be more balanced and develop more powerful management skills. You set personal goals that are clear and meet your needs. You identify and eliminate the barriers that get in the way of the achievement of goals. You communicate about what you need and want from others in a more responsible way.

How can a Manager/Executive use a coach?

Coaching creates an environment where there is freedom from judgment and freedom from expectations that executive behave according to typical corporate mandates. In this environment it is safe to question, to appear vulnerable, to observe, to explore, experiment, to learn and change. That allows the executive to use the coach...
...To reach high targets and quotas. Accomplishing this consistently requires a manager who also coaches a team to work together to reach extraordinary goals. ...For business planning, budgeting and goal-setting.
...To integrate business and personal life for balance. ...To prioritize actions and projects. ...For training, developing and managing staff. ...To turn around a difficult situation. ...To handle business or personal problems.