

COACHING AGREEMENT

Client Names _____

This agreement, between coach _____ and the above-named clients, will begin on _____ and will continue for a minimum of three months. The fee for the initial meeting is \$_____, and the fee for the initial three months is \$_____ per month, payable in advance each month.

The services to be provided by the coach to the clients are coaching or tele-coaching, as designed jointly with the clients. Coaching, which is not advice, therapy, or counseling, may address specific personal projects, business successes, or general conditions in the client's life or profession.

Upon completion of the three months, coaching will convert to a month-to-month basis. The client and coach agree to provide each other with fourteen-day notice in the event either wishes to cancel further services. It should be noted that the monthly fee is calculated based on an average of four weeks per month.

The coach promises the client that all information provided to the coach will be kept strictly confidential. Throughout the working relationship, the coach will engage in direct and personal conversations.

The clients can count on the coach to be honest and straightforward in asking questions and making requests. The clients understand that the power of the coaching relationship can be granted only by the clients, and the clients agrees to do just that: have the coaching relationship be powerful. If the clients believe the coaching is not working as desired, the clients will communicate that belief and take action to return the power to the coaching relationship.

Our signatures on this agreement indicate full understanding of and agreement with the information outlined above.

Clients Date

Coach Date

PERSONAL INFORMATION FACT SHEET

(All personal information is confidential and will be treated appropriately.)

Contact Information

Full name _____

Name you prefer to be called _____

Address _____

Home telephone _____ Work telephone _____

Pager and/or other telephone _____

Fax number E-mail address _____

Web site _____

Employment Information

Occupation (what you do to earn a living) _____

Employer name _____

Personal Information

Date of birth _____

Marital status _____ Number of children _____

Significant other's name _____

Significant other's date of birth _____

Wedding/special anniversary date _____

Name(s) and age(s) of child(ren) _____

INDIVIDUAL CLIENT INTERVIEW

As a coach, it's important for me to understand how you view the world in general and yourself in particular. Each person has a unique way of thinking and a unique way of interacting with those around him or her. Answer each of these questions as clearly and thoughtfully as possible, expressing the best of who you are. These are "pondering" questions designed to stimulate your thinking in a particular way that will make our work together even more productive. I suggest that you take several days to compose your responses to these questions.

Thank you.

1. What accomplishments do you think must occur during your lifetime so that you will consider your life to have been satisfying and well lived—a life of few or no regrets?

2. If there were a secret passion in your life, what would it be?

3. What do you consider your role to be in your local community? In your country? In the world?

4. If you could devote your life to serving others—and still have the money and lifestyle you need—would you do it? How would it look?

PRIMARY FOCUS

Identify five areas that you want held as your main focus during this coaching relationship. For each focus area, provide a simple heading and a description of a measurable result. For example:

BE MORE PRODUCTIVE. I have a system to follow up on calls and letters, I'm on time, I get all tasks accomplished, I have realistic goals for new projects.

1. _____

2. _____

3. _____

4. _____

5. _____

COACHING PREPARATION FORM

(Note: Some clients fax or e-mail this information prior to the coaching session.)

Preparing for the coaching session will allow you to optimize your results and our time together. Before the session, you may wish to answer the following questions:

1. How am I, today, right now? How has my week been? _____

2. What do I want to get out of the call today? _____

3. What action did I take since our last session? What were my wins/challenges? _____

4. What do I have to report? What do I want to be held accountable for? _____

5. What issues do I want to deepen on our call today? What are the challenges, concerns, achievements, or areas of learning to be addressed? _____

6. Debrief last week's inquiry: _____

7. What else? _____

COMPLETION LOG

(To be used by the coach and/or client.)

	Item to Complete	Do By	Done
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____
9.	_____	_____	_____
10.	_____	_____	_____
11.	_____	_____	_____
12.	_____	_____	_____
13.	_____	_____	_____
14.	_____	_____	_____
15.	_____	_____	_____
16.	_____	_____	_____
17.	_____	_____	_____

PROFESSIONAL ETHICS

Professional ethics are crucial to any service business. Ethics refers to an agreed upon set of moral principles or values, or rules of conduct. Professional ethics is a broad topic that includes personal conduct, professionalism, confidentiality, client referral to a therapist or consultant, and conflict of interest.

International Coach Federation (ICF) Code of Ethics

The following ICF Code of Ethics are taken directly from the ICF web site at www.coachfederation.org in July 2009.

Part One:

Definition of Coaching Section 1: Definitions

- Coaching: Coaching is partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.
- A professional coaching relationship: A professional coaching relationship exists when coaching includes a business agreement or contract that defines the responsibilities of each party.
- An ICF Professional Coach: An ICF Professional Coach also agrees to practice the ICF Professional Core Competencies and pledges accountability to the ICF Code of Ethics.

In order to clarify roles in the coaching relationship, it is often necessary to distinguish between the client and the sponsor. In most cases, the client and sponsor are the same person and therefore jointly referred to as the client. For purposes of identification, however, the International Coach Federation defines these roles as follows:

- Client: The “client” is the person(s) being coached.
- Sponsor: The “sponsor” is the entity (including its representatives) paying for and/or arranging for coaching services to be provided.

In all cases, coaching engagement contracts or agreements should clearly establish the rights, roles, and responsibilities for both the client and sponsor if they are not the same persons.

Part Two:

The ICF Standards of Ethical Conduct Preamble: ICF Professional Coaches aspire to conduct themselves in a manner that reflects positively upon the coaching profession; are respectful of different approaches to coaching; and recognize that they are also bound by applicable laws and regulations.

Section 1: Professional Conduct At Large

As a coach:

1. I will not knowingly make any public statement that is untrue or misleading about what I offer as a coach, or make false claims in any written documents relating to the coaching profession or my credentials or the ICF.

2. I will accurately identify my coaching qualifications, expertise, experience, certifications and ICF Credentials.
3. I will recognize and honor the efforts and contributions of others and not misrepresent them as my own. I understand that violating this standard may leave me subject to legal remedy by a third party.
4. I will, at all times, strive to recognize personal issues that may impair, conflict, or interfere with my coaching performance or my professional coaching relationships. Whenever the facts and circumstances necessitate, I will promptly seek professional assistance and determine the action to be taken, including whether it is appropriate to suspend or terminate my coaching relationship(s).
5. I will conduct myself in accordance with the ICF Code of Ethics in all coach training, coach mentoring, and coach supervisory activities.
6. I will conduct and report research with competence, honesty, and within recognized scientific standards and applicable subject guidelines. My research will be carried out with the necessary consent and approval of those involved, and with an approach that will protect participants from any potential harm. All research efforts will be performed in a manner that complies with all the applicable laws of the country in which the research is conducted.
7. I will maintain, store, and dispose of any records created during my coaching business in a manner that promotes confidentiality, security, and privacy, and complies with any applicable laws and agreements
8. I will use ICF member contact information (e-mail addresses, telephone numbers, etc.) only in the manner and to the extent authorized by the ICF.

Section 2: Conflicts of Interest

As a coach:

9. I will seek to avoid conflicts of interest and potential conflicts of interest and openly disclose any such conflicts. I will offer to remove myself when such a conflict arises.
10. I will disclose to my client and his or her sponsor all anticipated compensation from third parties that I may pay or receive for referrals of that client.
11. I will only barter for services, goods or other non-monetary remuneration when it will not impair the coaching relationship.
12. I will not knowingly take any personal, professional, or monetary advantage or benefit of the coach-client relationship, except by a form of compensation as agreed in the agreement or contract.

Section 3: Professional Conduct with Clients

As a coach:

13. I will not knowingly mislead or make false claims about what my client or sponsor will receive from the coaching process or from me as the coach.
14. I will not give my prospective clients or sponsors information or advice I know or believe to be misleading or false.
15. I will have clear agreements or contracts with my clients and sponsor(s). I will honor all agreements or contracts made in the context of professional coaching relationships.

16. I will carefully explain and strive to ensure that, prior to or at the initial meeting, my coaching client and sponsor(s) understand the nature of coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement or contract.
17. I will be responsible for setting clear, appropriate, and culturally sensitive boundaries that govern any physical contact I may have with my clients or sponsors.
18. I will not become sexually intimate with any of my current clients or sponsors.
19. I will respect the client's right to terminate the coaching relationship at any point during the process, subject to the provisions of the agreement or contract. I will be alert to indications that the client is no longer benefiting from our coaching relationship.
20. I will encourage the client or sponsor to make a change if I believe the client or sponsor would be better served by another coach or by another resource.
21. I will suggest my client seek the services of other professionals when deemed necessary or appropriate.

Section 4: Confidentiality/Privacy

As a coach:

22. I will maintain the strictest levels of confidentiality with all client and sponsor information. I will have a clear agreement or contract before releasing information to another person, unless required by law.
23. I will have a clear agreement upon how coaching information will be exchanged among coach, client, and sponsor.
24. When acting as a trainer of student coaches, I will clarify confidentiality policies with the students.
25. I will have associated coaches and other persons whom I manage in service of my clients and their sponsors in a paid or volunteer capacity make clear agreements or contracts to adhere to the ICF Code of Ethics Part 2, Section 4: Confidentiality/Privacy standards and the entire ICF Code of Ethics to the extent applicable.

Part Three: The ICF Pledge of Ethics

As an ICF Professional Coach, I acknowledge and agree to honor my ethical and legal obligations to my coaching clients and sponsors, colleagues, and to the public at large. I pledge to comply with the ICF Code of Ethics, and to practice these standards with those whom I coach.

If I breach this Pledge of Ethics or any part of the ICF Code of Ethics, I agree that the ICF in its sole discretion may hold me accountable for so doing. I further agree that my accountability to the ICF for any breach may include sanctions, such as loss of my ICF membership and/or my ICF Credentials.

Approved by the Ethics and Standards Committee on October 30, 2008. Approved by the ICF Board of Directors on December 18, 2008.