

## *Coaching Services Agreement*

Welcome! I look forward to working together. This document and attachments constitute a contract between us. Adherence to these guidelines is imperative for our relationship to work and for it to be of most benefit to you the client. Therefore, you should read it carefully and raise any questions and concerns that you have before you sign it.

**Payment Procedure and Session Time:** The services I, Carrie Vinson, will be providing are phone coaching services designed jointly with you, the client. There is an initial complimentary 30-minute telephone conversation to find out if you feel we are suited to work with one another. The coaching commitment is flexible and can be from a single session (55 minutes in length) to an annual retainer. I welcome brief (not exceeding 5-10 minutes) calls, e-mails, and texts between sessions at no cost and will often send out resources that support your development.

The cost for a 55 minute session is \$150.

Fees for coaching sessions must be paid at the time of service. Payments can be made on the website, [www.carrievinson.com](http://www.carrievinson.com).

**Call Procedure:** The Client will call the Coach at the pre-arranged time and telephone number as scheduled. You agree to give 24 hours notice if you need to cancel or change the time of an appointment. Otherwise, after the second such incident, all future cancellations will be charged in full. I agree that every effort will be made to reschedule sessions, which are cancelled in a timely manner.

### **Coaching vs. Counseling**

In addition to being a coach, I am also a Licensed Independent Clinical Social Worker in Massachusetts with training and experience to independently diagnose and treat mental illness and emotional problems. I am unable to engage in coaching services with you if you currently are a counseling client of mine nor will I be able to begin counseling services with you if you are currently a coaching client of mine.

While there are some similarities between coaching and counseling, they are very different activities and it is important that you understand the differences between them. Counseling is a health care service and is usually reimbursable through health insurance policies. This is not true for coaching. Both coaching and counseling utilize knowledge of human behavior, motivation and behavioral change, and interactive helping techniques. The major differences are in the goals, focus, and level of professional responsibility.

The focus of coaching is development and implementation of strategies to reach client-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 utilizes personal

strategic planning, values clarification, brainstorming, motivational techniques, and other helping techniques.

The focus of counseling is identification, diagnosis, and treatment of mental and nervous disorders. The goals of counseling include alleviating symptoms, understanding the underlying dynamics which create symptoms, changing dysfunctional behaviors which are the result of these disorders, and developing new strategies for successfully coping with the psychological challenges which we all face. Most research on counseling outcomes indicates that the quality of the relationship is most closely correlated with therapeutic progress. Counseling clients are often emotionally vulnerable. This vulnerability is increased by the expectation that they will discuss very intimate personal data and expose feelings about themselves about which they are understandably sensitive. The client's past experiences have often made trust difficult to achieve. These factors give counselors significant power that creates a fiduciary responsibility to protect the safety of their clients and to "above all else, do no harm."

The relationship between the coach and client is specifically designed to avoid the power differentials that occur in the counseling relationship. The client sets the agenda and the success of the enterprise depends on the client's willingness to take risks and try new approaches. The relationship is designed to be more direct and challenging. You can count on your coach to be honest and straightforward, asking powerful questions and using challenging techniques to move you forward. You are expected to evaluate progress and when coaching is not working as you wish, you should immediately inform them so together you and the coach can both take steps to correct the problem.

Because of these differences, the roles of coach and counselor are often in potential conflict and I believe that it is ethically inappropriate for one to play both roles with a client concurrently. Positive change is difficult enough without having to worry about role confusion. This means that if either of us recognizes that you have a problem that would benefit from psychotherapeutic intervention, I will refer you to appropriate resources. In some situations, I may insist that you initiate counseling and that I have access to your counselor as a condition of my continuing as your coach.

It is also important to understand that coaching is a professional relationship. While it may often feel like a close personal relationship, it is not one that can extend beyond professional boundaries both during and after our work together. Considerable experience shows that when boundaries blur, the hard won benefits gained from the coaching relationship are endangered.

No information in my coaching services is intended or implied to be a substitute for professional mental health, medical, or legal advice or is meant to replace any of these professional relationships. I recommend that you consult a qualified professional prior to utilizing any of the information provided by me during any of my coaching services.

## Confidentiality

As a Licensed Independent Clinical Social Worker, there are some situations in which I am legally obligated to breach confidentiality in order to protect you or others from harm. If I have information that indicates that a child or elderly or disabled person is being abused, I must report that to the appropriate county/state agency. If you report or appear, in my professional opinion, to be at imminent risk to harm yourself, or you make threats of imminent violence against someone else or property, I am required by law to take protective actions. As your coach I am ethically bound to protect the confidentiality of our communications and will do so. I will only release information about our work to others with your written permission or in response to a court order. These situations are quite rare in coaching practices. If such a situation occurs in our relationship, I will make every effort to discuss it with you before taking any action.

As you are no doubt 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 that are connected to the Internet; especially when there is not some form of security protection in place.

Some sessions, if you choose, could be conducted in a group format. By signing this agreement, you commit yourself to maintaining the confidentiality of all information communicated to you by other coaching clients and by me, your coach. We both understand that progress is often enhanced when clients are allowed to discuss their coaching relationship with trusted colleagues and friends. You can have these discussions, but you must in no way share information that leads to the identification of others in the group. If you are ever in doubt regarding what to reveal and what not to reveal, err on the side of protecting the privacy of others. This is a vital and nonnegotiable element of such group interaction.

**Dispute Resolution:** If the Coach ever says or does something that upsets the Client or does not feel right, the Coach requests that the Client bring it up. The Coach promises to reasonably do everything possible to satisfy the client.

If there is ever any disagreement that cannot be resolved, it will be arbitrated by telephone and both will be bound by the decision of a mutually-agreed arbitrator.

**Termination:** The Client or Coach may cancel at any time.

My signature below indicates that I have read the client information and policy statements in the Coaching Services Agreement and agree to abide by its terms during our professional relationship.

Coaching Client(s) Signature \_\_\_\_\_ Date \_\_\_\_\_

Coach Signature \_\_\_\_\_ Date \_\_\_\_\_