

## Make copy to send to clients!

### Coaching Agreement

I know this is long. Please grab a snack and take 10-20 minutes to read so that you know what this service is and can decide if it's right for you. As a board-certified coach, it's important to me to clearly communicate what coaching is, to cover some important legal and ethical considerations, and to give you a chance to ask questions before paying anything. You'll also be able to hold me accountable as your coach if you understand my role.

Clear expectations allow us to get right into the good stuff (progress toward your personal goals!) when we meet. If you have any questions about any of this, feel free to email me at [nicholas@core5health.com](mailto:nicholas@core5health.com).

#### Description of Services | Core 5 Health, LLC

<b>What Health Coaching is</b>	<b>What it isn't</b>
<b>Co-creating action plans with your coach with you taking the lead. Studies show we're more likely to stick with healthy change long-term when we have a large part in creating our own solutions. Our goal is to achieve the healthy changes that you desire and do so in a way that will last a lifetime.</b>	<b>You won't be given a specific plan or be told what to do - you aren't a robot with a manual. Your autonomy to make your own decisions on what to do (or not do) is up to you. Your coach is open to be more or less hands on (for example, giving you ideas on actions to take) depending on what you prefer.</b>
<b>A nonjudgmental, positive space to experiment (trial and correction) and build confidence with making healthy changes. Over time, these small changes will compound into significant progress. We'll work towards a strategy that you feel good about maintaining for life.</b>	<b>Specific eating, exercise, sleep, etc. instructions right off the bat. We will, however, collaborate and experiment to see what works best for you as an individual to achieve the results you desire. I recognize your uniqueness as a human being and honor it - no cookie-cutter approaches.</b>
<b>Collaborative conversations with the ultimate goal of strengthening motivation to reach your desired outcome. Your coach will use a technique called Motivational Interviewing for this. It feels just like a casual conversation.</b>	<b>Any kind of judgement. Your coach recognizes that healthy change, even the "simple" stuff, is difficult. I respect your efforts and will treat you as such.</b>
<b>Focus is generally on: stress management (Nicholas' specialty), sleep, eating, exercise, and/or hydration. I am open to working on</b>	<b>Diagnosed anxiety, depression, and substance abuse are out of my professional scope of practice. I would give you resources</b>

<p>more areas as long as they are within my scope of practice. Working on one often benefits the others. If it's important to you, bring it up!</p>	<p>to find proper support in these cases. If you want to work on something else within my scope, we can do that. For example, anxiety has a lot of overlap with stress which we can work on.</p>
<p>Sessions look like a casual conversation. Comfortable, ideally enjoyable and energizing, not a chore. You'll be speaking with a coach specializing in behavior change techniques whose goal is to empower you to both reach your goals, and to have the tools and confidence to continue to tweak your healthy habits as you please, even after our working together.</p>	<p>Coaching isn't like having a teacher talk at you, or a personal trainer telling you what to do. It's collaborative. I'll encourage you to share your ideas because I assume that you're an expert on your own life, and I'll try to show you that you probably are more capable than you think. You're in charge.</p>
<p>Your coach will look to you to take the lead, though will be here for guidance and support. Your coach can provide more or less ideas and support depending on your preference.</p>	<p>Your coach has lots of experience working with people in this setting, but will not assume an expert role. Since your agenda and your goals are our priority, you are the expert.</p>
<p>Your coach will treat you with unconditional positive regard. I believe you are capable of improving your health and will always treat you as such.</p>	
<p>You choose what we talk about in our sessions. If you ever want ideas on topics to discuss or relevant activities to do outside our sessions, just ask!</p>	<p>Coaching isn't about eliminating your habits and starting from scratch. Comfortable change, rather than dramatic change, is what leads to lasting results. We start where you are and make small tweaks that will bring significant results over time.</p>
<p>You will be asked insightful questions to gain clarity around what you truly want to achieve. We will create action plans, plan ahead for obstacles, and decide what kind of accountability is comfortable (and hopefully even enjoyable) for you to move with intention toward your desired outcomes.</p>	<p>You will never be pushed or forced into sharing something you don't want to share. Our sessions are your time, so you get to decide what we talk about. Think of your coach as a "guide on the side", gently guiding the conversation to keep moving toward progress, with you taking the lead.</p>
<p>If your coach thinks you may try an action that could be harmful to your health (for example, eating too few calories), I will tell you. Under the NBHWC (the board I'm certified for coaching under) Code of Ethics, protecting your health and safety is a top priority.</p>	<p>Recommendations or prescribed actions. However, if you'd like, your coach is open to brainstorming ideas, sharing possible routes of action, sharing what works for others and what is scientifically shown to be effective, though will always leave it up to you to decide what to do.</p>

<p><b>Your coach will not work harder than you - we can spend as much time as you like discussing visions and goals, but it'll be up to you and the action you take as to whether you see results. Outside of sessions, your coach cannot take actions for you.</b></p>	<p><b>Guaranteed results. Results are a product of the actions you decide to take outside of our sessions.</b></p>
<p><b>Collaborating together, we will empower you to feel confident about implementing healthy habits even after our time together finishes. This is the big one! You'll have the tools to tweak your path in the future and build new habits whenever you feel like it.</b></p>	
<p><b>There's so much health info floating around but so little context. Coaching brings context. You'll have another human being, who also knows what it's like to struggle and experience ups and downs to work with to connect the dots. Together, we'll turn confusion into confidence.</b></p>	<p><b>Most health pros miss this step of tying together how general health information relates to your unique situation. With coaching, we care that you have a family, pets, a busy job, etc. to work around.</b></p>
<p><b>Coaching is a generalist approach, as opposed to a specialist. Core 5 recognizes that the majority of people just want to feel better and want someone to care deeply about them as they make this journey. While coaching does have a scope to stay within, it's very broad.</b></p> <p><b>You could hire a physician, personal trainer, rehab specialist, and a dietician... or you could work with someone who understands the Core 5 areas (eating, exercise, sleep, stress management, and hydration), is willing to work on what you want/need at any given time instead of telling you what to do, and will work hard to build an understanding and compassionate connection as you strive to make healthy change.</b></p> <p><b>Please note that coaching is not a replacement for these services, especially if you need specialized care.</b></p>	<p><b>Coaching isn't a specialist approach. We don't think you should be running around town to 4 different appointments each week paying 4 overpriced, specialized services just to manage your health and wellbeing. We see you not as a piece of a machine, or a problem to be fixed, as unfortunately is the case in a lot of health professions.</b></p> <p><b>We see you as a whole human who wants to explore how to feel better, and this requires a broad view of our habits, especially in the Core 5 areas, and a nonjudgemental person to talk with. We see you as someone who wants a patient and understanding teammate (a good way to think of your coach) who will treat you with respect as we work together.</b></p>
<p><b>We will use an app called Healthie to interact. It allows you to make a free account, and our chats and video sessions are all in one place. It was built for health professionals and provides us with secure</b></p>	

<b>communication. Once we've both signed this agreement, I'll send you an email invite for easy set-up of the app. Set-up takes less than 5 minutes.</b>	
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**Coach responsibilities:**

1. Provide time and space for my client to recognize discrepancies between their current state of health and their ideal health. I will elicit this self-discovery nonjudgmentally and work with my client to shorten these discrepancies.
2. Co-create a collaborative partnership that supports my client to deepen their self-awareness, enhance creative ability, foster personal mastery, and cultivate their full potential.
3. Ask thoughtful, timely, and appropriate questions with intentions to help my client consider what needs to be considered to realistically reach their goals, that foster and support greater self-awareness and inner resourcefulness, and assist in working through any personal roadblocks/obstacles (conscious or unconscious) that may arise.
4. Help my client build self-awareness to discover where positive change can be made, especially around the areas they say are important to them. I will strive to show my client how capable they are of making healthy change by reminding them regularly of their strengths and progress.
5. Honor that some experiences/things in life are private, which my client may or may not choose to share or explore as part of these coaching sessions.
6. Facilitate evidence-based coaching processes/techniques designed to help tap into client's inherent wisdom and insights, work through perceived challenges, and explore creative possibilities and potential including new paths forward the client may not have considered.
7. Work my way out of my client's life. Everything I do will be aimed at helping them build healthy habits, build self-awareness on what works for them to be successful with this, and empower them to feel confident and in control of their health and their life.
8. Light teaching where appropriate with permission from client, so they can better understand the science of behavior change to be able to connect the dots around what does and doesn't work for them. This will help my client achieve lifelong results.
9. I specialize in coaching around stress management and the Core 5 areas, but recognize that my clients are unique and will have different goals. Therefore, I will be open to their ideas on what to work on and their agenda comes before mine. I am open to working on whatever my client wants to as long as it's within my professional scope of practice.
10. I specialize in coaching around the Core 5 areas (Sleep, stress, eating, exercise, hydration), specializing in stress management, with the broad view that when we focus on these 5 big picture areas, the little things will fall into place. I may not be a content

expert in every single area of human health (for example, keto, specific exercise routines, etc.). I may not always have the answers to my client's questions on the spot. Saying this, if a client has a specific approach they'd like to explore, it's my professional responsibility to explore it with them, and I will put in time to learn outside our sessions so I can support my client as best I can.

11. I am NBHWC (National Board for Health and Wellness Coaching) certified. I am trained in and commit to using evidence-based coaching methods shown to help my client achieve long lasting healthy change.
12. Act ethically and treat my client with kindness and respect. If I believe a client won't get value from my coaching, I will tell them explicitly and explain why I think this. Positive impact comes before monetary profit.
13. Coach can terminate the coaching relationship at any time for any reason.
14. In order to get in contact with my client's physician, therapist, or other health professional, I will need written consent from them first.
15. Respect my client's choice to decide what they will and won't do as a result of our working together. I will not pressure them towards specific actions.
16. Help my client discover new possibilities for positive change and build their self-efficacy (their belief in themselves).
17. Strive to act with integrity in all my interactions with my client.
18. I respect my client's humanity and recognize that their feelings and attitudes are ever changing. Despite this, I will practice unconditional positive regard for my client, always believing they are whole, wise, an expert on their own life, capable of success, and I will treat them as such.

#### **Client responsibilities:**

1. I recognize that I'll be doing the heavy lifting outside of sessions if I want to see results. My coach cannot take action for me.
2. I understand that my coach will let me take the lead when discussing action plans. Studies show we're more likely to maintain habits for life when we design them ourselves (versus being told what to do).
3. I understand that my coach will ask questions, sometimes bold ones, to help me break out and discover new possibilities for the future and to be thoughtful about what to do and how to move forward. I will tell my coach if I want to change the subject which I can do at any time, for any reason.
4. I recognize my coach can provide more or less guidance depending on what I prefer. If I want something changed - for example, if I'm overwhelmed and want my coach to give me more ideas, if I want them to talk less often and hold more spaces so I can have time to process and think, etc. - I will tell my coach. If I'm irritated by how my coach does things, I will respectfully say so with the expectation that my coach will reciprocate my respect by listening, caring about my perspective, and adjusting accordingly.

5. I recognize that I have lots of good ideas and will share with my coach, knowing I'm in a nonjudgmental and encouraging environment.
6. I am ultimately responsible for keeping myself accountable (though my coach will guide and provide lots of support for this with this until I'm doing it on my own!).
7. I will be honest with myself when goal setting. For example, if I have little free time, I will tell my coach and we can discuss goals that can take just a minute or two each day.
8. I recognize that ups, downs, and frustrations are all part of change. Progress is rarely linear. It's normal for feelings about progress to change often, and if I feel discouraged I can bring it up to my coach who will help me remember my strengths, the progress I've already made, and my personal reasons to keep going.
9. If a question or topic comes up that neither coach or clients knows the answer to, I am willing to look into it along with my coach and we both will share our findings when we next meet.
10. I am human. As a client, I'm not expected to always show up happy-clappy and fully energized. My humanity will be respected by my coach. What I'm feeling on any given day is perfectly okay. During coaching, I'll do my best, whatever my best looks like that day, to engage and to use our time constructively.
11. I have the right to stop coaching whenever I wish for any reason.
12. I understand that prescribing or recommending medications is strictly outside the scope of my coach's practice.
13. I recognize that my coach has a professional scope of practice and if they tell me they can't help me with something, I will respect this. If my coach gives me a resource for another avenue of support and I don't take it, my coach may be obligated to terminate the coaching relationship as per his board of ethics recommendations.
14. I will let my coach know if I don't think this service is helpful for me. (Core 5 doesn't want to be charging money unless the service provides good value.) While refunds aren't always guaranteed, I always have the right to ask.
15. I respect our agreed upon meeting times. If I contact my coach outside of our sessions, I may not get a quick response. I will look at this as an opportunity to experiment which will aid in building my self-efficacy (belief in myself) over time, leading to lasting success.
16. I recognize my coach is human and imperfect, yet will strive to be the best copilot for me as I move toward my goals. I will strive to act with integrity and treat my coach with kindness and respect while staying true to myself.
17. I recognize that working on my health can cause changes to my physical and mental health. **I accept full responsibility for my actions and outcomes.** I will not hold my coach liable for the actions I take or the resulting outcomes. The positive progress I achieve is mine and mine alone to take credit for.
18. I will be intentional about making empowering, conscious choices that truly reflect and support my needs/desires/goals in life.
19. I will do my best to follow through and be accountable for the completion of any action planning steps/activities generated as a result of each coaching session. Saying this,

perfection is never expected and I'll be kind and patient with myself (my coach will be too).

20. I understand and agree that I am fully responsible for my physical, mental and emotional well-being during our coaching conversations, including my choices and decisions. All coaching topics/issues for discussion are my choice. I am aware that I can choose to change the subject or discontinue coaching at any time.
21. I understand that my coach will coach in a manner which reflects the National Board of Health and Wellness Coaching (NBHWC) Core Competencies and upholds the NBHWC Code of Ethics.
22. I understand that coaching is a relationship with my coach designed to facilitate the creation of wellness and personal goals and to develop and carry out a strategy/plan for achieving those goals.
23. I understand that coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, and recreation. I acknowledge that deciding how to handle these issues and implementing my choices is exclusively my responsibility.
24. I understand that my coach uses an app called Healthie to provide this service. If any tech issues arise within the platform, I can expect my coach to reach out over email or phone to explain what's going on and what they'll do to continue to support me.
25. I commit to a coaching partnership that supports my abilities to:
  - a. Deepen self-awareness and strive to identify challenges, issues, and/or opportunities I may be experiencing.
  - b. Become aware of and commit to working through any blind spots, roadblocks, or obstacles to success that may arise.
  - c. Utilize emerging insights/learning to enhance my personal/professional growth and development.

### **Rescheduling or Missed Sessions**

1. If coach misses a session, even for something out of his control such as a tech issue, coach will do his best to communicate the issue with client. The session can be rescheduled and will be free. If client has prepaid, they will get a refund for that session.
  - a. I strive to provide reliable service and will do my best to avoid this. I have my schedule in the app, my personal calendar, and a spreadsheet I note down sessions on to avoid this.
2. If client misses a session: if client notifies coach at least 24 hours in advance, the session can be rescheduled. If less than 24 hour notice or no notice is given, client is not entitled to a rescheduled session or a refund.

## Confidentiality

1. Your coach is familiar with current HIPAA (Heath Insurance Portability and Accountability Act) laws and takes confidentiality seriously.
2. Anything you share with your coach will not be shared with anyone else.
  - a. The only exception is that by law, if we're told something illegal (for example, child or elder abuse), we'd have to notify the proper authorities. Outside such extreme cases, you can have the expectation of tight confidentiality both with assessment results (if applicable), any written notes your coach takes to aid in supporting you, your personal identifying information (name, etc.), and anything you say aloud.

## Scheduling and Payment Policy - Video plus Text Coaching

1. Client will get one 30-minute face-to-face coaching session per week [that they can schedule at their convenience] plus 1-2 text messages per day on weekdays.
2. Coach and Client will meet over video chat [once a week for \_\_ weeks, each session being 30 minutes in length].
3. **The price is \$[ ] per session, coming to a total payment of \$[ ]. Payment is expected before coaching sessions unless otherwise agreed upon.**
4. If I need to reschedule one of our scheduled meetings, I will try provide at least 24 hours advance notice if possible. I understand that other than an emergency situation that I will be responsible for payment of the session if there is a less than 24 hour cancellation.
5. Since effective sessions can vary in length of time, I can choose to end early whenever I wish, and while I can ask to extend a Zoom session, it may not always be possible.
6. I understand that Healthie is a HIPAA-compliant software and will not hold my coach liable for any external breach or hack of the software.
7. Client gets one 2-week trial to test out the service.

## Scheduling and Payment Policy - Text only Coaching

1. Client will get one 60 minute period of live, back and forth texting per week plus 1-2 messages per weekday.
2. **Coach and client will be ready to live chat on the app from the hours of [ ] on these days of the week: [ ].** Coach will remove all distractions to give the client the focus they deserve, just as if the meeting were in person.
3. **The price is \$[ ] per [week/month], coming to a total payment of \$[ ] for \_\_ weeks of working together. Payment is expected before coaching sessions unless otherwise agreed upon.**
4. Healthie is a free app for clients. I understand that Healthie advertises as HIPAA-compliant communication and will not hold my coach liable for any external breach or hack of the software.



5. Client gets one 2-week trial to test out the service.

### **Intellectual Property**

1. Worksheets and documents provided by Core 5 Health, LLC are the property of Core 5 Health, LLC and are not to be shared to third parties.
  - a. Basically, please don't go around giving other health companies our resources.

### **Disclaimer**

1. I understand that coaching does not involve the diagnosis or treatment of mental disorders as defined by the DSM-IV published by the American Psychiatric Association. I understand that coaching is not a substitute for counselling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment and I will not use it in place of any form of diagnosis, treatment or therapy.

2. I will not use coaching as a substitute for counseling, psychotherapy, mental health care or substance abuse treatment. I recognize that I am seeing this professional as a coach and not a licensed mental health professional, physician, advisor, consultant or mentor.

3. I give my coach permission to keep a confidential record of my name, email, and phone (if provided) for scheduling purposes. They will not be shared with anyone else. This information is kept on a password-protected spreadsheet. I will not hold my coach liable if there's an external breach to the software.

4. I give my coach permission to occasionally check in with me by contact over email to see how I'm doing with my goals and to send inspiration or ideas to support me. (If you don't want this, I can either take it off the agreement completely or you can tell me at any time and I'll refrain from doing so).

5. I understand that coaching is not to be used in lieu of professional advice. I will seek professional guidance for advice regarding academic, legal, medical, financial, business, spiritual or other matters. I understand that all decisions in these areas are exclusively mine and I acknowledge that my decisions and my actions regarding them are my responsibility.

### **Non-Discrimination Policy**

1. Discrimination based on race, religion, sex, (including pregnancy, sexual orientation, or gender identity), national origin, disability, or age will not be tolerated.

### **Other**

1. Please note if you are pregnant or have serious health conditions, I may refer you to a physician if they could best support you. Coaching is not the best avenue if you're looking mainly for specific advice.
2. Please note that coaching is currently available in English only. If Spanish is better for you, send me an email.

Thank you greatly for reading this tedious document. Having clear expectations is a great start to a coaching relationship, and we can get right into coaching when we meet if we take care of the logistics now. **Please sign and send to [nicholas@core5health.com](mailto:nicholas@core5health.com). Instructions for setting up the app we'll interact over will be emailed to you and we'll be off!**

**I have read this whole document and agree to all of the above. If signing electronically, I agree that my typed or electronic signature is equal to a handwritten signature.**

**Client Signature:**

**Coach Signature:**