**CLIENT POLICIES AND PROCEDURES & COACHING AGREEMENT**

**POLICIES AND PROCEDURES**

**Payment** Clients pay me on time (at the date specified on the invoice or prior to beginning our work together) unless prior arrangements have been made. All payments can be made via PayPal using a PayPal account or with a credit or debit card. Invoicing is done by email. Clients will be able to pay their invoice directly and securely over the Internet (even without a Paypal account). Electronic wire transfer may be available upon request.

**Procedure** Please be on time for our appointments. We will make arrangements for our meeting platform in advance of our sessions. I meet clients via Skype, Zoom, FaceTime, Google Hangouts or by phone. Occasionally, I see clients in person. I expect you to call me at the designated time on the agreed upon platform. Come to the session with updates, progress and current challenges. Let me know what you want to work on and be ready to be coached. Our session agenda is always client generated and coach supported. If you’re feeling stuck, you may consider using a session prep form. Just let me know and I will happily to send you one.

**Sessions** Our agreement includes a set amount of time. If you or I are on vacation, then we spend more time before you/I leave and after you/I return. As much as possible, I recommend you schedule your sessions at least one week in advance.

**Changes** I require 24-hours notice if you must cancel or reschedule a call. If you have an emergency, we will work around it. If you miss more than two scheduled appointments, I will not be able to continue to work with you. In the case of missed appointments, all previously paid fees are non-refundable. Missed calls are not made up unless we have made prior arrangements.

**Extra Time** You may call or email me between sessions if you need to check in about something, are struggling with an issue or want to share a success. I love being available to you on this as-needed basis. I do not bill for this extra level of service. However, I do ask that in these cases you keep calls to 5-10 minutes. If you call me and leave a voicemail, let me know whether you’re expecting a call back or just wanting to share. If you email me, please do the same. I strongly discourage you from scheduling coaching hours outside of our regular contract. However, in the event that we agree to make this arrangement, you will be charged for additional time at a mutually agreed upon rate.

**Terms of** If you have concerns about our work together, I expect you to notify me

**Service** immediately. You may terminate your contract at any time. All fees for previously undertaken coaching sessions are non-refundable. Fees for coaching sessions not undertaken because of termination of your contract will be fully refunded.

For workshops, facilitation and combined coaching/facilitation programs, a cancellation fee totaling 25% of our total billed amount will be assessed for cancellations less than two weeks prior to the date of the event or start date of the program for which World Tree Coaching, LLC has been contracted. No cancellation fee will be applied for reschedules.

I reserve the right to end our coaching relationship at any time if I feel that coaching is not the right fit for your situation or if I feel that I cannot meet your needs. I will be open and honest about this and will notify you both in person (including by phone or video conference) and in writing if I need to end our contract. All funds for services not provided will be fully refunded.

**Concerns** I want you to be satisfied with our relationship. If I ever say or do something that upsets you or doesn’t feel right, please let me know. I promise to do what is necessary to satisfy your coaching needs. Your feedback throughout the coaching process, clarity about what is working and not working for you, as well as clearly stating your goals for our contract in general and for individual sessions specifically is important. I expect and assume you will bring any concerns to me promptly so that I may address them.

**Privacy** In accordance with the International Coach Federation Code of Ethics (link available on the forms section of my website) I maintain the strictest of confidentiality standards except when the law requires release of information or in the event that I have reason to believe you may be a danger to yourself or others.

 My preferred platform for client sessions is Zoom. Zoom offers HIPPAA compliant, end-to-end encryption. Details on Zoom’s security features is available [here](https://zoom.us/docs/doc/Zoom-Security-White-Paper.pdf).

Moreover, protecting your personal data is important to me. I maintain an electronic record of the information you provide in this signed client agreement and your client data form. I store those records on a secure cloud-based location. I also maintain your name and email address in my client hours log for credentialing with the International Coach Federation and in the event that I am subject to an ICF credentialing audit.

**The Key** It is necessary for clients to implement the coaching in order to experience success. You have hired a coach to help you do things differently than you have ever done them before. If you choose to not use the coaching and keep doing what you have always done, you will be unlikely to see the results you hope for. You have challenged yourself to make a change! I’m proud of you and will support you every step of the way!

**COACHING AGREEMENT**

Name:

Coaching Package Name:

Initial Term of Service:       sessions.

Fee (if applicable):      $

Check here if your coaching fees are paid by your employer or sponsor. [ ]

Check here if you have already paid the fee: [ ]

1. As a client, I understand and agree that I am fully responsible for my well being during my coaching sessions, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time. I recognize that coaching is not psychotherapy and that professional referrals will be given if needed.
2. I understand that life coaching is a relationship I have with my coach that is designed to facilitate the creation/development of personal, and/or professional goals and to develop and carry out a strategy/plan for achieving those goals.
3. I understand that life coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education, and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.
4. I understand that life coaching does not treat mental disorders as defined by the American Psychiatric Association. I understand that life coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment; and I will not use it in place of any form of therapy.
5. I promise that if I am currently in therapy or otherwise under the care of a mental health professional, that I have consulted with this person regarding the advisability of working with a life coach and that this person is aware of my decision to proceed with the life coaching relationship.
6. I understand that information will be held as confidential unless I state otherwise, in writing, except as required by law.
7. I understand that certain topics may be anonymously shared with other life-coaching professionals for training or consultation purposes.
8. I understand that life coaching is not to be used in lieu of professional advice. I will seek professional guidance for 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.
9. I know where to access a copy of the ICF Code of Ethics (included in the forms section of the World Tree Coaching website).
10. I agree to have my name and email address appear in my coach’s client coaching hour log for credentialing with the International Coach Federation. I understand that this information will be shared with the ICF in the event that the coach is subject to a credentialing audit.

I have read, understand and agree to the Policies and Procedures and the Coaching Agreement as stated in this document.

Name:       Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: