



## Intake Form

Name Primary phone # Phone # to call for coaching sessions

Name of employer Short description of current position

This Agreement is entered into as of the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, between Polly Chandler (“Coach”) and \_\_\_\_\_ (“Client”).

**1. Coaching Role:** My role as Coach is to support you in establishing strategic goals for your professional development, and to facilitate a process that enables you to set action steps that move you towards those goals.

**2. As the Coach, I agree to:**

- A. Create a space of trust and open conversation. I will practice active, nonjudgmental listening, and will be committed to supporting you in reaching your goals.
- B. Keep all our conversations confidential, unless I feel that you are at risk to yourself or others, in which case I will inform you of my concerns. As your Coach I do reserve the right to challenge unethical and immoral activities and actions.
- C. Keep us focused, and to check our progress during our sessions. I will check in with you to make sure we are meeting your goals, or if you need to change the goal.
- D. Respond to your emails between coaching sessions, and set up 10 minute conversations by telephone, if there is a pressing need.

**3. As the Client, you agree to:**

- A. Come to the coaching relationship with the intention of being honest, and growing as a professional.
- B. Understand that all comments and ideas offered by the Coach are solely for the help of aiding you in achieving your goals, and give consent to the Coach to aid in achieving those goals.
- C. Communicate to the Coach at any time, if I believe the coaching relationship is not working as desired.
- D. Meet or call the Coach at the agreed time, and adhere to the cancellation policy.
- E. Be responsible for carrying out the action steps I formulate during the coaching session.
- F. Understand and agree that I am fully responsible for my well being during the coaching calls, and this includes my choices and decisions.



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- 4. Confidentiality Agreement:** The conversations that we have within our coaching sessions are confidential, and will be protected as such. Information will be shared outside our sessions only with your written consent, or in the event that a Court Judge demands it. However, the following are instances where I would be obligated to break our confidentiality agreement without your permission.
  - A. If it is assessed during your participation in coaching sessions that abuse or neglect of children or elders occurring.
  - B. If in my presence you threaten to kill or harm another individual, and I am convinced you will act on that threat, or that you may lose control of your actions.
  - C. If at any time during the course of our sessions, I determine that you are a danger to yourself, I will inform you of that opinion, and make every effort to keep you from endangering your life. In some cases this may include notifying the police or a family member.
- 5. Statement of Intent:** Client understands that all comments and ideas offered by the Coach are solely for the purpose of aiding Client in achieving his or her defined goals. Client has the ability to give informed consent, and hereby gives such consent to the Coach to assist in achieving his or her goals.
- 6. Release of Liability:** Client hereby releases Polly Chandler and Chandler Coaching, their agents, successors, personal representatives, executors, heirs and employees from every claim, suit, action, demand or right to compensation for damages, Client may claim to have, or that Client may have arising out of actions, omissions or commissions taken by Client or by Coach as a result of the advice given by Coach, or otherwise resulting from the coaching relationship contemplated hereunder. Client further declares and represents that no promise, inducement or agreement not herein expressed has been made to Client to enter into this release. The release made pursuant to this paragraph shall bind Client's heirs, executors, personal representatives, successors, assigns and agents.
- 7. Cancellation Policy:** I have a 24-hour cancellation policy. If either of us needs to reschedule, we should notify the other person 24 hours in advance via phone and email. Clients who do not honor this policy will be charged for services.

### Please Sign:

Client Name	Signature	Date
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Coach Name	Signature	Date
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Polly Chandler
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