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***Patricia Burgin, MA, Master Certified Coach***

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***The SeattleCoach® Professional Coaching Agreement***

***“Buckle Up!”***

As we get off to a solid start, I invite you to spend some time with the following questions. Some of them will make you pause and reflect, while others will be easier to answer. Taking time to think about your life is the best starting point for people who are starting to work with a professional coach.

**Your Contact Info**

Name       Best e-mail address       Today’s Date

Best phone number for vm/texts

*My job as a coach is to help you identify and refine what you want to create as you move forward. Along the way we may also identify what is limiting and needs to stop (or be unlearned), and what you want to keep or maintain. As we collaborate on those things, I will keep an eye on both your big picture goals (“Mt. Everest”) as well as your weekly and monthly “base camps”. As we agree on direction and outcomes, I like to work in a fairly focused and steady way a quarter at a time, co-creating and evaluating as we go. These questions will help you reflect on where you are, what your assets and strengths are and always, on what you want to accomplish.*

The following three questions are both poignant and powerful. You may want to eventually answer all three. Each one has helped people to make choices about what to keep and accelerate, and what to diminish and leave behind. But probably, you being you, one of these questions inspires you more than the others. Please ***respond to the question that most energizes you today.***

***Door #1****: “If you reach the age of 95 and continue to live your life and order your time the way you are right now, what regrets do you think you will have? Do not include things from the past—only things you will regret if you continue your exact present path.”*

***Door #2****: “Imagine we’re sitting here two years from now and you’re grinning at me because you’ve created a great new chapter. What are some of the things you see? What’s going on out there?”*

***Door #3****: “Write about times when you are at your best—great personally and professionally, knowing you are making a difference, connecting with people and projects that mean a lot to you and having a blast.”*

In light of what you just wrote, what is something important you would like to figure out in the next three months?

What would you say have been your 3 greatest accomplishments to date?








What do you see as your “craft” or an area of true mastery?

What major transitions are you in the midst of, just starting or just wrapping up? (Entering or approaching a new decade, a new relationship, a loss, a new child, recovery, leaving a soul-sucking job, starting a better one, moving/remodeling, changes in your children’s ages/stages, retirement, etc.)

Who are the people in your life that track with you? (Key friends, family, colleagues, stake-holders?)

Would you be willing to let these people know what you are working on and want to change or create?       (Their occasional feedback and encouragement will likely be useful.)

Coaching will help you to focus on your present and your future. As we work together to sculpt your next chapter we will explore your core motivations. We’ll find ways to increase your levels of satisfaction and contribution. Questions of meaning and service are spiritual for many people. Are there spiritual resources or other ways of reflecting and re-charging that you expect will be helpful to you as we build our partnership?

**Your “Character Strengths”**

I have a brief inventory for you to take as we get started together. ["The VIA Survey of Character"](http://www.viacharacter.org/www/The-Survey) is a free, well-researched questionnaire that will help you to identify your integrated top five (of twenty-four) "Character Strengths". Because this is part of a research project, you will be asked to register, but they won't spam you. Click on the "VIA Survey" button to begin. After you’ve finished the survey, copy your top five “character strengths” into the boxes below. (No need to purchase a report unless you want to.) As we work together, I will ask you to keep a copy of your top five Character Strengths handy. For an eight-minute video summary of the research behind the project, [click here](http://youtu.be/U3nT2KDAGOc).

1.

2.

3.

4.

5.

In addition, if you have found another inventory or assessment (DISC, MBTI, Firo-B, Emergenetics, Insights, Strengthsfinder, Enneagram) to be useful to you, please feel free to send them to me your results, along with this document, once you’ve completed it.

**SOME IMPORTANT SMALL PRINT**

Though I am still a licensed systems therapist, and may use expertise from that training, this agreement is for a professional coaching relationship that will be focused on your enhanced performance and personal satisfaction. Our coaching relationship is specifically designed to avoid the power differentials that can occur in psychotherapy. As your coach I will be both direct and challenging. In our work together you can count on me to be professional, genuine and present as I work with you to make changes.

**PAYING FOR COACHING**

Coaching is a significant investment of time and money. I work with most of my clients for six to twelve months as they create sustainable change.

As we launch our work together, we begin with an extra long meeting (about an hour and fifteen minutes, regular sessions are forty-five to fifty minutes). As we begin, we’ll begin to get an overview, to find our focus and first steps and to create our partnership for the coming months. Every quarter I like to plan on ten hours of face-time (or phone-time) together. Since much of your work is designed to happen between our meetings, your payment includes all check-ins via phone, text and email. And when I see an additional resource that I believe would be useful to you, I'll bring it up. As we move through our work, we evaluate and at the end of each quarter, either wrap up or continue for another round. [Click here](https://www.seattlecoach.com/paying-for-coaching.html) for payment specifics and options.

For Microsoft leaders, I’ll send you a Statement of Work so that you can set up a Purchase Order for up to ten hours of work over the course of one quarter. My Microsoft Vender Number: #1125847.

**CANCELLATIONS**

When we book a time together, the time is reserved for you. My practice is to ask for a day’s notice if you have to cancel. If something urgent comes up, please leave a voicemail or text me. If you don’t show up for a scheduled session, I’ll call you. (We can always meet by phone if necessary.) If you don’t show up or contact me, and if I can’t reach you by phone, I’ll charge you for the session. And if I don’t show up or contact you, the next session is on me. If there are conditions of snow and ice, I’ll contact you before 10a on the day of our scheduled appointment, and you can choose: We can either reschedule or meet by phone.

**CONFIDENTIALITY AND NON-DISCLOSURE**

As your coach, I will do all in my power to keep confidential all communications between you and me. Your information belongs to you. Communication by e-mail and cell phone may not be secure, so you acknowledge and agree that the use of electronic communication is acceptable. I conduct some sessions in groups. If you decide to participate, I ask that you agree to maintain the confidentiality of all information communicated to you by other members of the group or team.

If your employer or sponsor is paying for your coaching and has an interest in your progress, I will ask you to have a conversation about outcomes with him or her as we get underway. I’m frequently a part of these conversations, and when I’m working with members of a team, my expectation is that information related to the health and success of the organization be communicated as freely as possible. When your information or news is difficult to share, I'll help you with that communication. When information related to your personal life comes up (how can it not?), I consider that to be yours to share, not mine. Where life stuff lands on your performance at work, I’ll work with you, and if need be, help you to decide how to talk about it.

As we go along, your employer or sponsor may want to evaluate our progress via the results they see in your life as my coachee. **But I make sure that everyone knows that the actual content of coaching conversations stays between you and me.** The only exception to this is if I see something that is a threat to the performance and well-being of the company and your colleagues, and we can’t find a way for you to talk about it.

As I establish a coaching agreement with a sponsor (the person or org who’s paying for your coaching it you’re not), I usually communicate something like this: *“When I coach a member of your team, you can count on me to give it my best shot. I’ll welcome your thoughts on our outcomes. And your team member will likely learn and grow and develop in significant ways. I can’t guarantee that, in their development, they won’t decide to move on or out or up into more responsibilities, maybe even outside of your organization. I can guarantee that they will always be grateful to you for this opportunity.”*

Bottom line, I will be rigorous about [The International Coach Federation Code of Ethics](http://coachfederation.org/about/ethics.aspx?ItemNumber=854&navItemNumber=4047). When I bring in other coaches to work alongside me in organizations, I ask that they hold these same standards.

**RESOLVING DIFFERENCES**

Our work together will be a partnership, and this includes how we will evaluate our progress and conclude together. I want you to be really satisfied with our work together. If, at any time, you feel that your needs are not being addressed, or you are not getting what you want out of our work together, I’ll trust you to tell me so we can problem-solve. We will discuss your needs and concerns, make appropriate adjustments, and continue to work on the goals you define unless you are ready to stop, which we will do whenever you ask. If you’ve paid for a quarter and still have some sessions “in the bank” you can either request a refund or use the remaining time within twelve months.

**SIGN HERE**

Your Signature       Date

Your Coach

Patricia Ellen Burgin, MA, MCC

That’s it. Thanks for the thoughtfulness and reflection with which you’ve reviewed these questions. You’ve just taken a step toward identifying your opportunities and outcomes, your obstacles and your assets and strengths. Please make a hard copy of “Buckle Up” for yourself. And please e-mail a signed copy to me, or bring one to our first session.

***I’m looking forward to our work together!***

Your Coach,



Patricia Ellen Burgin, MA

Master Certified Coach

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