



## PRQuickhelp Coaching—Client Information, Roles and Responsibilities, Terms of Engagement

Please complete, review, sign and mail to PRQuickhelp Nonprofit Consulting and Coaching, c/o Pat Richter, M.P.A, 125 Manor Drive, Red Bank, New Jersey 07701. Thank you!

Name \_\_\_\_\_

Address \_\_\_\_\_

Day Phone \_\_\_\_\_ Evening Phone \_\_\_\_\_

Fax \_\_\_\_\_ Email \_\_\_\_\_

Children (Names & Ages) \_\_\_\_\_

Partner's Name \_\_\_\_\_

Your Birthday \_\_\_\_\_ Occupation/Employer \_\_\_\_\_

It's an honor to be your coach and I look forward to working with you. Our relationship is a co-creative one, meaning that we are equals and we each have an active role to play. I am not a therapist, counselor or consultant, but a trained coach that will support you as a detached thinking partner. Together we create a synergy that results in meaningful change and dynamic actions towards your goals.

### **Client Responsibilities:**

- Selecting the agenda— Complete and e-mail the Session Prep Questions provided to you prior to each session via e-mail. Use the first e-mail document you receive as a template to create a new one each for each subsequent session. The most crucial part is for you to name what you'd like to take away from the session.
- Be on time for sessions. Sessions will not be extended to accommodate lateness.
- Come to your session centered and ready to engage.
- Provide feedback in the moment about your coaching experience -- what works, as well as what does not. Let the coach know if questions or comments are not on tract. Negotiate, accept, or decline action plan suggestions
- Create an action plan at the end of each session.

### **Coach Responsibilities:**

- Listen closely to you, respond to what I hear, and ask clarifying and stimulating questions.
- Remain unattached to being 'right'
- Support you in making an action plan.
- Request that you 'stretch' to deepen the work done in the session, perhaps by writing, taking some action, resolving relationships or things that feel incomplete.
- Keep the content of all sessions confidential

### **Extra Time**

Between sessions, you may contact me with questions, a brief update, or to bounce some ideas around. Please keep these contacts succinct. If it seems like it will be better served as session material, I will suggest that.

### **Getting More from the Coaching Experience**

- Make coaching sessions a priority. Come to every call with a specific agenda – a clear understanding of what you'd like to take away from the session.
- Do your own work between sessions. Use what you learn. Complete what you agree to do.
- Be open-minded. Try new approaches. Experiment.
- Be willing to change your beliefs and patterns if they do not serve you anymore.

### **Schedule Changes/Vacation/Business Trips**

We will choose a regular time for our sessions that is mutually acceptable. This will be your time slot. If something must change temporarily or permanently, I will be happy to work that out with you.

Please give our call high priority and arrange your schedule to honor our agreed upon time. If you must reschedule our call, I ask you to give me 24 hours notice. In any case, let me know as soon as you are able. I will not reschedule no call/no shows. If you have vacation or business trips that will conflict with our sessions, please notify me of these as soon as you have an itinerary and we will discuss when to reschedule. I will do the same with you when I plan trips.

### **COACHING TERMS:**

Fee: \$200.00 for 4 sessions that must be used within a four week period (Fee waived at this time)

Duration of session: approximately 45 minutes

Session Day: Monday Tuesday Wednesday **Thursday** Friday

Session Time: \_10:30 am \_

### **Procedures:**

- Call 732-383-5780 for our sessions.
- If you call in and get my voice mail, please call back after one full minute.
- Please do not leave a message and wait for me to call you back.

I understand that Pat Richter, Certified Coach, is not a licensed therapist and that I am responsible for all my decisions, actions and feelings.

I have read and understand the PRQuickhelp Coaching roles and responsibilities as well as the terms of engagement, and agree with them.

Signature/ Date \_\_\_\_\_