

## CCP PARTICIPANTS' COACHING AGREEMENT

As you know, an element of your Coach Certification Program (CCP) is to receive a version of the *Immunity-to-Change* coaching cycle yourself. In the same spirit of providing you the coachee's experience of what we think of as "best practices" in this tradition, we ask you, as we do with our own coachees, to look over this agreement. You will have opportunities during the first residency to ask any questions about this, and, if you are in accord with the contents of this document, please sign at the bottom, keeping a copy for your own records, and giving us your signed copy before you leave Residency 1.

### **Coachee's Understandings and Agreements.**

1. *Nature of Service.* I understand that a required element of my participation in the CCP is to participate, as a coachee, in a version of an *Immunity-to-Change (ITC)* coaching cycle aimed at helping me accomplish some personal change or professional improvement goal. I understand my coach will be a faculty member in the CCP who will later supervise my work with my own "practice coachee." I understand that services provided by my coach are educational in nature, aimed to advance my learning; that my coach does not provide, and the ITC approach does not intend to provide, psychological services, psychotherapy, or psychological counseling; that an ITC coaching cycle is *professional education*, not *treatment*. I understand that, while most people find the coaching process extremely beneficial, I assume the risks inherent in self-reflection, and agree this is an appropriate time for me to take up activities of self-exploration. If I am currently in psychotherapy, I agree I have consulted with my therapist about the suitability of my participating in a coaching relationship at this time.
2. *Confidentiality.* I understand my coach will hold all communication between us (written and spoken) as confidential without limit of time. My coach will not: (a) share any aspect of our communication with any party outside the CCP; (b) divulge to anyone that he/she is in a coaching relationship with me without my permission; (c) make use of privileged information for his/her benefit or the benefit of a third party. I understand that my coach may discuss aspects of our coaching with other CCP faculty, and that if he/she does those with whom my coach speaks will be bound by the same confidentiality agreements above.
3. *Timely work.* I understand and agree that I will spend approximately one hour weekly on a given structured assignment, and another hour, roughly every 2 weeks, with my coach. My coach will give me my next assignment at the end of each session. I will submit each assignment to my coach by e-mail attachment no later than 24 hours before my next scheduled meeting.

My coach will hold me to the timetable we agree upon at the inception of the program. My coach is not obligated to extend the length of a coaching meeting, nor provide services after the agreed-upon end-date, even if, due to my postponement of completing some assignments, I have not finished the cycle.

It is expected that some unforeseen circumstances will require rescheduling of meetings. I will e-mail my coach **and** leave a voice message as soon as I know that I need to reschedule. I understand that if I am not able to provide 24 hours advance notice of the need to reschedule, my appointment may be considered "missed" and not rescheduled.

4. *Fees.* I understand that the cost of these coaching services is included in my CCP tuition. I understand and agree that long-distance calling costs will be my responsibility.
5. *License and ownership of the e-workbook.* I understand and agree that *Minds At Work, LLC* remains the owner of all materials which may be used during my coaching, and that my use of these materials is bound by the separate license agreement I have signed as a participant in the CCP.

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Signature

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Print Name

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Date



## “PRACTICE COACHEE’S” AGREEMENT

As you know, I am participating in a program that teaches coaches a new approach to helping people make the changes or improvements they seek in their personal- or work-lives. During this program I will receive supervision from a faculty-member in the program--a coach experienced in this approach—who will oversee my work with a volunteer coachee. I very much appreciate your interest to be my “practice coachee”. I hope you will find it personally valuable, and I know you will be of help to my learning. The purpose of this document is to make sure you understand, and agree to, the nature and terms of this relationship.

**Participant’s Understandings and Agreements.** Please make a copy of this document for your own records, and sign below to acknowledge your understanding of, and agreement with, the following:

1. *Nature of Service.* I am choosing to participate in a 16-20 week coaching cycle aimed at helping me accomplish some personal change or improvement goal. I understand my coach will be a participant in a coach-training program run by Minds at Work, LLC, and that a coach-trainer, experienced in the approach being taught in the program, will be supervising the work of my coach. I understand my coach will meet with me (by phone or face-to-face) 8-10 times during this process, approximately every two weeks, for about an hour each time, and that I will be expected to do a little “homework” between sessions that should normally take about an hour a week. I understand that services provided by my coach are educational in nature, aimed to advance my learning; that my coach does not provide, and the approach my coach is learning does not intend to provide, psychological services, psychotherapy, or psychological counseling. I understand that, while most people find the coaching process extremely beneficial, I assume the risks inherent in self-reflection, and agree this is an appropriate time for me to take up activities of self-exploration. If I am currently in psychotherapy, I agree I have consulted with my therapist about the suitability of my participating in a coaching relationship at this time.
2. *Relationship to My Coach.* I agree that I am not a relative of my coach; not a co-worker with my coach; and that I am neither an employee nor an employer of my coach.
3. *Confidentiality.* I understand my coach will hold all communication between us (written and spoken) as confidential without limit of time. My coach will not: (a) share any aspect of our communication with any party outside the coach’s training program; (b) divulge to anyone that he/she is in a coaching relationship with me without my permission; (c) make use of privileged information for his/her benefit or the benefit of a third party. I understand that my coach may discuss aspects of our coaching with faculty and fellow participants in the training program for the purpose of his/her learning, and that if he/she does (a) my coach will not identify me by name; and (b) those with whom my coach speaks will be bound by the same confidentiality agreements above.
4. *Timely work.* I understand and agree that I will spend approximately one hour weekly on a given structured assignment, and another hour, roughly every 2 weeks, with my coach. My coach will give me my next assignment at the end of each session. I will submit each assignment to my coach by e-mail attachment no later than 24 hours before my next scheduled meeting.

My coach will hold me to the timetable we agree upon at the inception of the program. My coach is not obligated to extend the length of a coaching meeting, nor provide services after the agreed-upon end-date, even if, due to my postponement of completing some assignments, I have not finished the cycle.

It is expected that some unforeseen circumstances will require rescheduling of meetings. I will e-mail my coach **and** leave a voice message as soon as I know that I need to reschedule. I understand that if I am not able to provide 24 hours advance notice of the need to reschedule, my appointment may be considered “missed” and not rescheduled.

5. *Fees.* I understand that this coaching cycle is being offered to me at no charge. If there are costs associated with coaching over the phone, I understand these will be my responsibility.
6. *License and ownership of the e-workbook.* I understand and agree that *Minds At Work, LLC* remains the owner of all materials which may be used during my coaching;, and that I am not permitted, during or after my coaching cycle, to copy or in any way distribute these materials to others.
7. *Likely Outcomes.* I understand that the usual coaching cycle will help me:
  - Identify at least one personal or professional change goal, my specific behaviors that currently impede the accomplishment of the goal, and the assumptions that drive these behaviors.
  - Envision successful change, with measurable steps towards achieving it.
  - Learn a methodology for observing how my assumptions impact my interpretation of events, my reactions and the reactions of others.
  - Learn a methodology for testing personal assumptions and identifying under what specific conditions, if at all, they prove to be true.
  - Develop more effective behaviors and more productive mental models as a result of realizing false assumptions.
  - Identify specific hooks or triggers that lead to old behaviors and develop strategies for overcoming them.

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Signature

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Print Name

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Date

**“PORTFOLIO COACHEE’S” AGREEMENT**

As you know, I \_\_\_\_\_ (coach’s name) am participating in a program that teaches coaches a new approach to helping people make the changes or improvements they seek in their personal- or work-lives. As I complete this program I will compile and submit a “portfolio” that documents my work with a volunteer coachee and demonstrates my capacity to coach using the Immunity To Change approach. I very much appreciate your interest to be my “portfolio coachee.” I hope you will find it personally valuable, and I know you will be of help to my learning. The purpose of this document is to make sure you understand, and agree to, the nature and terms of this relationship.

**Participant’s Understandings and Agreements.** Please make a copy of this document for your own records and sign below to acknowledge your understanding of, and agreement with, the following:

1. *Nature of Service.* I \_\_\_\_\_ (client name) am choosing to participate in a 16-20 week coaching cycle aimed at helping me accomplish some personal change or improvement goal. I understand my coach is a participant in a coach-training program run by Minds at Work, LLC, and that Lisa Lahey or Robert Kegan, who developed the approach being taught in the program, will be read and assess the portfolio documenting my coach’s work with me. I understand my coach will meet with me (by phone or face-to-face) 8-10 times during this process, approximately every two weeks, for about an hour each time, and that I will be expected to do a little “homework” between sessions that should normally take about an hour a week. I understand that services provided by my coach are educational in nature, aimed to advance my learning; that my coach does not provide, and the approach my coach is learning does not intend to provide, psychological services, psychotherapy, or psychological counseling. I understand that, while most people find the coaching process extremely beneficial, I assume the risks inherent in self-reflection, and agree this is an appropriate time for me to take up activities of self-exploration. If I am currently in psychotherapy, I agree I have consulted with my therapist about the suitability of my participating in a coaching relationship at this time.
2. *Feedback on Coaching.* I understand and agree to participate in a 30 minute phone call with Lisa Lahey or Robert Kegan, after they have reviewed the portfolio of my coach’s work with me. In this conversation, Bob or Lisa will ask me a few questions about my experience of being coached. I understand that I will not be asked to talk about the specifics or *content* of my learning but will instead be asked about my overall *satisfaction* with my progress and the experience. I understand that Minds At Work will pay for the cost of the call (domestic and international). I also understand that my coach will send Minds At Work my contact information in order to schedule this phone call.
3. *Relationship to My Coach.* I agree that I am not a relative of my coach; not a co-worker with my coach; and that I am neither an employee nor an employer of my coach.
4. *Confidentiality.* I understand my coach will hold all communication between us (written and spoken) as confidential without limit of time. My coach will not: (a) share any aspect of our communication with any party outside the coach’s training program; (b) divulge to anyone that he/she is in a coaching relationship with me without my permission; (c) make use of privileged information for his/her benefit

or the benefit of a third party. I understand that my coach may discuss aspects of our coaching with faculty and fellow participants in the training program for the purpose of his/her learning, and that if he/she does (a) my coach will not identify me by name; and (b) those with whom my coach speaks will be bound by the same confidentiality agreements above.

5. *Timely work.* I understand and agree that I will spend approximately one hour weekly on a given structured assignment, and another hour, roughly every 2 weeks, with my coach. My coach will give me my next assignment at the end of each session. I will submit each assignment to my coach by e-mail attachment no later than 24 hours before my next scheduled meeting.

My coach will hold me to the timetable we agree upon at the inception of the program. My coach is not obligated to extend the length of a coaching meeting, nor provide services after the agreed-upon end-date, even if, due to my postponement of completing some assignments, I have not finished the cycle.

It is expected that some unforeseen circumstances will require rescheduling of meetings. I will e-mail my coach **and** leave a voice message as soon as I know that I need to reschedule. I understand that if I am not able to provide 24 hours advance notice of the need to reschedule, my appointment may be considered “missed” and not rescheduled.

6. *License and ownership of the e-workbook.* I understand and agree that *Minds At Work, LLC* remains the owner of all materials which may be used during my coaching;, and that I am not permitted, during or after my coaching cycle, to copy or in any way distribute these materials to others.

7. *Likely Outcomes.* I understand that the usual coaching cycle will help me:

- Identify at least one personal or professional change goal, my specific behaviors that currently impede the accomplishment of the goal, and the assumptions that drive these behaviors.
- Envision successful change, with measurable steps towards achieving it.
- Learn a methodology for observing how my assumptions impact my interpretation of events, my reactions and the reactions of others.
- Learn a methodology for testing personal assumptions and identifying under what specific conditions, if at all, they prove to be true.
- Develop more effective behaviors and more productive mental models as a result of realizing false assumptions.
- Identify specific hooks or triggers that lead to old behaviors and develop strategies for overcoming them.

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Signature

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Print Name

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Date