**Karen Carlsen**

**Therapeutic Enneagram Expert**

**Coach/Mentor Agreement**

**Therapeutic Enneagram Coaching Agreement**

This agreement is established between Karen Carlsen (“the Coach” or "Mentor") and\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(“the Client” or “you”) for professional Coaching/Mentoring services. The following principles outline the nature of our working relationship, in order to ensure you achieve what is most important to you. Should you have questions or concerns, or wish to include items not specified in this agreement, please let me know.

**Coaching/Mentoring Description**

Coaching/Mentoring is an alliance between the Coach/Mentor and the Client/Mentee engaging in a thought-provoking and creative process that inspires the Client/Mentee to maximize personal and professional potential.

Enneagram Coaching/Mentoring may address specific personal projects, professional challenges, or general conditions in your life. Elements of Enneagram coaching and Mentoring may include developing a personal or professional development plan according to cpenneagram academy’s requirements, typing interview, type assessment and recognition, identifying type patterns of thinking, feeling and behaving, brainstorming ways to self observe these patterns, identifying plans of action, examining modes of operating in life, asking clarifying questions, and making empowering requests.

You are the sole decision-maker in the enneagram coaching/mentoring process. Any and all actions or consequences resulting from the coaching/mentoring session are your responsibility.

**Enneagram Coaching Commitments**

**Coach/Mentor**

Though I cannot guarantee specific results, I will bring my skills, experience, training and expertise to our work together, focussing exclusively on you during our time together. You can expect me to:

* be your ally, champion, supporter, confidant and sounding board;
* be direct, straightforward, challenging, understanding, compassionate and honest;
* ask clarifying, provocative questions and make empowering requests (including assigning homework/fieldwork) that support your desired outcome;
* encourage you to be clear, focused and proactive in support of your desired outcomes;
* strengthen your personal accountability by tracking with you the status and outcomes of your commitments and action plans; and,
* honor your time and contribution, provide an environment that supports the coaching process, bring my best self to every session, and always show up on time, prepared and ready to work with you.

**Client/Mentee**

As my Client, you acknowledge that you are engaging in Enneagram Coaching/Mentoring to observe automatic type patterns that keep you stuck, commit to recognizing these patterns and pursuing together a path toward growth to further self awareness and self compassion, make changes or clarify direction in your life, and that deciding how to handle these challenges and implement your choices is exclusively your responsibility.

**You understand and agree that:**

* Enneagram coaching/mentoring is neither therapy, nor a substitute for therapy, and does not prevent, treat or cure any mental disorder or medical disease. Though my background includes a clinical license, I do not diagnosis nor offer clinical treatment for mental health disorders that have resulted from trauma, addiction, abuse, history or sudden onset of a more serious or persistent mental health disorder. Should you need additional support for these circumstances, I will help you find appropriate clinical care so that you can receive the necessary clinical support you require.
* You acknowledge and understand that our work together is not a substitute for professional advice or counsel by legal, medical, psychological, financial, business or other qualified professionals. All decisions in these areas, and actions regarding them, are your sole responsibility;
* motivation, commitment to action, honest communication and openness to feedback are integral to the coaching/mentoring process. Anything less than your full and intentional participation will not result in success;
* change is a process; some changes will occur quickly, while others take time. In order for the coaching/mentoring relationship to develop momentum and power, and to achieve your objectives, I commit to a multi-session term of at least 90 days;
* should you determine that the coaching/mentoring is not generating the results you desire, you will let the Coach/Mentor know, and take the action necessary to redesign our relationship as your needs change;

**Confidentiality**

I will not disclose information about you, whether documented or verbal, and what we discuss in our coaching sessions to any other party without your express written permission, nor will I disclose your name as a reference without your express written consent.

Confidential information does not include information that:

1. was in the Coach’s possession prior to its being furnished by the Client; ie feedback reports provided by cpenneagram academy after the Experiential Enneagram retreat that requires ongoing mentoring to students of this academy as well as PDP development. (PDP = Personal/Professional Development Plan)
2. is generally known to the public or in the Client’s industry;
3. is obtained by the Coach from a third party, without breach of any obligation to the Client;
4. is independently developed by the Coach without use of, or reference to, the Client’s confidential information; or,
5. that the Coach is required by law to disclose.

According to the ethics of our profession, topics may be anonymously and hypothetically shared with other coaching/mentoring professionals for training, supervision, mentoring, evaluation, further coach professional development and/or consultation purposes. Like many professionals, I consult with colleagues and my cpenneagram coach teachers as needed.

**Session Cancellation**

You agree that it is your responsibility to notify me of any need to cancel a scheduled session no less than 24 hours in advance, except in case of emergency. With the exception of the initial 20 - 30 minute free consultation call, all sessions will be 50 minutes in length. Should you arrive late for a session, we will use the time remaining; arriving more than 30 minutes late will result in cancellation of the session. I reserve the right to charge you for cancelled sessions. I will attempt to reschedule sessions cancelled outside the 24-hour window, or for emergency reasons, within five business days.

Should I need to reschedule a session, the same considerations will apply.

**Term and Completion**

This agreement extends for the length of our agreed upon coaching/mentoring relationship. For clients/mentees associated with cpenneagram academy’s professional certification or personal track programs, the fee for sessions is $125 for the 3 required integration sessions between classes or retreats and defaults to my $160 fee once this integration time is completed and further work together is agreed upon.

Should you wish to end our coaching/mentoring relationship, please let me know as soon as you know. As endings and the process of termination hold valuable information and experience for both Coach/Mentor and Client/Mentee, I would value the opportunity to have a closing discussion before we end our work together.

Should I decide to end our work together, the same considerations will apply.

**Schedule and Payment**

Together, we will determine the optimal frequency of coaching/mentoring sessions to address your agenda. As stated previously, for those cpenneagram academy students needing 3 integration sessions between classes/retreats, at the reduced rate, we will address this need in the initial intake session.

**Payment is required in advance for all sessions, as follows:**

* $160 base fee for regular sessions
* $125 fee for students of Cpenneagram academy for integration sessions

Sessions are scheduled and paid for at time of scheduling using Squarespace and Square’s confidential payment system. Credit cards maybe kept securely on Squarespace platform; authorization form will be completed by client/mentee as desired.

Should I decide to adjust my rates at the conclusion of this agreement, I will notify you no less than 30 days prior to the agreement’s end.

**Housekeeping**

Our meetings will take place primarily by telephone, Doxy or Zoom, though in person options may be possible. We will mutually agree on timing (and location, if appropriate). You will call me using the contact information I provide. I will be available to you by email between scheduled meetings.

There will sometimes be accountabilities between sessions. These may be written, and at other times more observational or action-oriented. I recommend you have a notebook at hand in which you can take notes during our sessions, journal, and capture the insights you will no doubt experience throughout our coaching and this process.

Should I ever say or do anything that upsets you, or doesn’t feel right, please let me know as soon as possible, so that we can resolve your concern. My objective is to have a coaching/mentoring relationship that is fully open, honest, real and trusting in our communication styles. As this is a required part of the Enneagram path to growth, it is necessary to learn how to give and receive feedback as well as manage reactivity patterns. We should both realize that communication by telephone or email entails extra challenges, since we can not see body language, facial expressions, etc. Therefore, we must give each other plenty of latitude, and promptly ask for clarification if there is a misconnection, misunderstanding or miscommunication.

**Limited Liability**

Except as expressly provided in this agreement, the Coach/Mentor makes no guarantees or warranties, express or implied. In no event will the Coach/Mentor be liable to the Client/Mentee for any consequential or special damages. Notwithstanding any damages that the Client may incur, the Coach’s entire liability under this agreement, and the Client’s exclusive remedy, will be limited to the amount paid by the Client to the Coach under this agreement for all services rendered up until the termination date.

This is the entire agreement of the parties and reflects a complete understanding of the parties with respect to the subject matter. This agreement supersedes all prior written and oral representations.

If a dispute arises out of this agreement that cannot be resolved by mutual consent, the parties agree to attempt to mediate in good faith for up to 30 days after notice given. If the dispute is not resolved, in the event of legal action, the prevailing party shall be entitled to recover attorney’s fees and court costs from the other party.

Please sign this agreement and email it to [carlkr@karencarlsen.com](mailto:carlkr@karencarlsen.com) prior to our first scheduled session.

Client: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

name

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Coach: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mentor

Karen Carlsen

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_