

Coaching Welcome Packet

Congratulations on your decision to work with a coach. Coaching can truly be a transformational experience! You may be wondering, what is coaching? The International Coaching Federation defines coaching as: “Partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.”¹ That’s my goal...to inspire you to maximize your personal and professional potential. Think about the possibilities!

As your coach, I will support you by:

- Using a client-centered focus
- Actively listening
- Asking questions
- Helping you explore options
- Helping you prioritize actions
- Asking about progress
- Being there at each step in the process
- Maintaining confidentiality
- Providing optional assessments
- Meeting in person, by phone, or by Skype



Your role is to fully participate in the coaching process. Be open-minded. Honestly respond to questions. Be willing to think of new options. Take new steps. This process can make a difference!

In this packet you will find the following support materials:

- Coach’s Background
- Code of Ethics
- Phone Etiquette & Session Guidelines
- Call Prep Form
- Coaching Agreement

“Working with Merle has been an uplifting and enriching experience on many levels. I have found him to be genuine, compassionate, and professional; he TRULY cares, and I have grown exponentially with his guidance and support.” Bruce

In order to determine if I am the right coach for you, let’s do a complementary session to get acquainted. Call me today at (916) 788-1094 or by email at change@surewest.net. I wholeheartedly look forward to working with you and helping you maximize your personal and professional potential!

¹ International Coach Federation, <http://www.coachfederation.org/ICF/For+Coaching+Clients/What+is+a+Coach>, (accessed: December 13, 2007).

Coach's Background

Name: Dr. Merle Switzer

Background: I work exclusively in the field of leadership and have a passion for helping leaders be more effective. I have a strong leadership background professionally and in other contexts. I spent more than half of my 28-year career in the management and executive ranks of the Sacramento County Sheriff's Department. I was often called upon to start new programs and improve performance in struggling units. Twice, as an executive, I was selected as the Service Area Manager of the Year. In short, I have experience leading in a wide range of leadership contexts, such as in crisis, times of change, and in ethically challenging situations.

Since 2004, I have been helping leaders from many sectors be more effective and organizations reach new heights in performance. I train, speak at conferences, consult, and coach...all different methods of helping leaders be more effective. I am a Certified Management Consultant (CMC) through the Institute of Management Consultants.

Here is a summary of my education and training.

Education

Doctor of Strategic Leadership, Leadership Coaching Emphasis	2010
Master of Public Administration	1983
Master of Arts in Criminal Justice	1980
Bachelor of Arts in Criminal Justice, Minor: Business Admin.	1976

Training

Coach U – Coaching Core Essentials	2011
International Coaching Federation Conf.	2011
IMC – Annual Conference	2008-10
Master Instructor Update Conference	2006
Problem-Based Learning Certification	2005
LAPD West Point Leadership	2004
Master Instructor	2003
POST Command College	2001

"Merle is an excellent life coach...Through thought provoking questions, encouragement and accountability; he helped me become clearly aware of where I was, where I really wanted to be, and most importantly, what I needed to do to get there. He brings an unmistakable energy and enthusiasm to his coaching. Very practical and forward thinking, he is a coach among coaches." Todd

When appropriate, I use tools to assist with coaching. First, I use a behavioral profile, DiSC, to determine the coachee's behavioral style. Second, I use a 360-assessment tool to obtain feedback, assist the coachee in using that feedback to set goals, and evaluate the effectiveness of changes implemented by the coachee.

Code of Ethics

As your coach, I aspire to conduct myself in a manner that reflects positively upon the coaching profession; am respectful of different approaches to coaching; and recognize that I am also bound by applicable laws and regulations.

Here are key excerpts from the International Coaching Federation's Code of Ethics, which I embrace. As your coach:

1. I will not knowingly make any public statement that is untrue or misleading about what I offer as a coach, or make false claims in any written documents relating to the coaching profession or my credentials.
2. I will accurately identify my coaching qualifications, expertise, experience, and certifications.
3. I will conduct myself in accordance with the ICF Code of Ethics in all coaching related activities.
4. I will not knowingly take any personal, professional, or monetary advantage or benefit of the coach-client relationship, except by a form of compensation as agreed in the agreement or contract.
5. I will not knowingly mislead or make false claims about what my client or sponsor will receive from the coaching process or from me as the coach.
6. I will not give my prospective clients or sponsors information or advice I know or believe to be misleading or false.
7. I will honor all agreements or contracts made in the context of professional coaching relationships.
8. I will carefully explain and strive to ensure that, prior to or at the initial meeting, my coaching client and sponsor(s) understand the nature of coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement or contract.
9. I will respect the client's right to terminate the coaching relationship at any point during the process, subject to the provisions of the agreement or contract. I will be alert to indications that the client is no longer benefiting from our coaching relationship.
10. I will maintain the strictest levels of confidentiality with all client and sponsor information. I will have a clear agreement or contract before releasing information to another person, unless required by law.

Phone Etiquette & Session Guidelines

My desire is to make each coaching session as productive as possible. Here are some things you can do to contribute to a great session.

Before the session:

- Email the Coaching Call Prep Form and any other information to the coach twenty-four hours prior to the session.
- Clear your mind.
- Remove distractions.
- Turn off other telephones.
- Arrange to be in a place conducive for coaching...quiet and confidential.
- Avoid calling on a cell phone while driving or in areas with intermittent service.
- Have a pencil and pad handy for notes.

Starting the session:

- Call as close as possible to the scheduled time.
- If the phone is busy or isn't answered, please call back in 5 minutes.

During the session:

- Please speak clearly and concisely.
- Be present, which requires FOCUS. Your center of interest should be on the session and our conversation. Here are some useful tips:
 - Turn away from your computer and desk, unless you are taking notes on the computer.
 - Remove reading material.
 - Avoid drinking or eating.
 - Take a moment to think before you respond, if needed.

After the Session:

- Finish writing any notes.
- Make sure the next coaching session is on your calendar.
- Schedule time to follow through on your goals.
- Share your goals with others you trust.

Coaching Call Prep Form

Please E-mail to change@surewest.net 24 hours prior to Coaching Call

Name: _____ Call Date/Time: _____ Next Call: _____

What I have accomplished since our last call (Wins/Successes):

-
-
-

What I wanted to complete, but did not:

-
-
-

The challenges/problems I am facing now:

-
-
-

The opportunities which are available to me right now:

-
-
-

Coach, what I want to focus on during this coaching session is:

-
-
-

What I am committed to do by the next call (to be decided during coaching session):

-
-
-

Please file this in your Coaching Folder

Coaching Agreement

Coaching is an ongoing relationship between a coach and a person who desires coaching. Together, we agree that:

1. Coaching is not therapy, counseling, advice-giving, mental health care, or treatment for substance abuse. The coach is not functioning as a licensed mental health professional, and coaching is not intended as a replacement for counseling, psychiatric interventions, treatment for mental illness, recovery from past abuse, professional medical advice, financial assistance, legal counsel, or other professional services.
2. Coaching is for people who are basically well adjusted, emotionally healthy, functioning effectively, and wanting to make changes in their lives.
3. Coaching is designed to address issues the person being coached would like to consider. These could include (but are not limited to) career development, relationship enhancement, spiritual growth, lifestyle management, life balance, decision-making, and achieving short-term or long-term goals.
4. Coaching will be an ongoing relationship that may take a number of months, although either party can terminate the relationship at any time.
5. Coaching can involve brainstorming, values clarification, the completion of written assignments, education, goal-setting, identifying plans of action, accountability, making requests, agreements to change behavior, examining lifestyles, and questioning.
6. Coaching is most effective when both parties are honest and straightforward in their communication.
7. Coaching will take place by telephone and email unless agreed upon otherwise. It is the responsibility of the person being coached to call the coach on the agreed upon day and time for every coaching session.
8. Both parties will be diligent and prompt for sessions in order to make the most of their time together. If either party must cancel or re-schedule, it will be done at least twenty-four (24) hours in advance. Missed sessions and failing to cancel with the required notice, excepting emergencies, will result in being billed \$250 for the session.

Coaching Agreement, Continued

9. Payment for services will be discussed prior to coaching and both parties will agree to a fee, form of payment, and initial length of commitment. However, fees are due within a week after services are provided, except on a monthly billing cycle, in which case fees are due at the beginning of the month for services that month.
10. Coaching is a confidential relationship and the coach agrees to keep all information strictly confidential, except in those situations where such confidentiality would violate the law, where permission has been granted, and with respect to tracking names, hours coached, and contact information where necessary for coaching certification.
11. Coaching assumes that each person in the relationship is guided by his or her values and beliefs. The coach is a committed follower of Jesus Christ and seeks to live in accordance with this commitment. The coach is honest in making this declaration, but he respects the different values and beliefs of others. The coach does not seek to impose his values on another, proselytize, condemn, or refuse coaching services to people who do not share similar values and beliefs.
12. Coaching will be fun, exciting, and rewarding for both parties.
13. Each of the people whose signatures appear below agrees that this agreement represents our mutual understanding of the coaching relationship.

Signature (person being coached) Date

Signature (coach) Date