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Welcome!
My Method
Questionnaires, Coaching Commitment, & Fees

Welcome!

I am excited to journey with you as your coach as you discover the confidence to stand up, speak out, and take control of your life for lasting behavior change.

I look forward in being your partner by helping you co-create the healthy life you desire by peeling away layers, uncovering hurdles, and discovering the real You!

My Method

My coaching method is "Explore, Expand, and Evolve into YOU!"

Together we will explore your options, expand your awareness, and evolve into your authentic, confident, healthy you.

Questionnaires, Coaching Commitment & Fees

Please fill out the following questionnaires prior to our initial coaching session. The questions are designed to bring to the surface a picture of the current state of your life, your perspective and vision.

This is an opportunity to begin framing your future and what you would like to have happen for yourself. This information is helpful for me to understand who you are and how I can best support you, your goals, and what you want to achieve in your life.

I. Contact Information

Name _____

Pronouns (She/Her He/Him) _____

Mailing Address _____

Home Phone _____

Cell Phone _____

Email Address _____

Birthdate _____ Age _____

Occupation _____

Single _____ Married _____ Divorced _____

II: Lifestyle & Health History Questionnaire

Medical Information

1. How would you describe your present state of health? very well healthy unhealthy ill other: _____

2. Are you taking any prescription medication? Yes No

If yes, what medications and why? _____

Do these interact with foods or weight loss in any way? _____

3. Do you take any over-the-counter medication? Yes No

If yes, what medications and why? _____

4. When was the last time you visited your physician? _____

5. Have you ever had your cholesterol checked? Yes No

Date of test: _____ What were the results?

Total Cholesterol: _____ HDL: _____ LDL: _____

TG: _____

Note: HDL = High-density lipoprotein; LDL = Low-density lipoprotein; TG = Triglycerides

6. Have you ever had your blood sugar checked? Yes No

What were the results? _____

Family History

Please check any that apply to you and list any important information about your condition:

7. Has anyone in your immediate family been diagnosed with the following?

Heart disease If yes, what is the relation: _____
Age of diagnosis: _____

High cholesterol If yes, what is the relation: _____
Age of diagnosis: _____

High blood pressure If yes, what is the relation: _____
Age of diagnosis: _____

Cancer If yes, what is the relation: _____
Age of diagnosis: _____

Diabetes If yes, what is the relation: _____
Age of diagnosis: _____

Osteoporosis If yes, what is the relation: _____
Age of diagnosis: _____

8. What are your dietary goals? _____

9. Have you ever followed a modified diet? Yes No

If so, describe: _____

(e.g., low-sodium or low-fat)? Yes No

If so, what type of diet? _____

10. Why did you choose this diet? _____

Was the diet prescribed by a physician? Yes No

How long have you been on the diet? _____

11. Have you ever met with a registered dietitian? Yes No

Are you interested in meeting with one? Yes No

12. What do you consider to be the major issues in your diet and eating plan? (e.g., eating late at night, snacking on high-fat foods, skipping meals, or lack of variety)

13. How many glasses of water do you drink per day? _____ 8-ounce glasses

14. Do you have any food allergies or intolerance? Yes No

If so, what? _____

15. Who prepares your food? Self Spouse Parent Minimal preparation

16. How often do you dine out? _____ times per week

Habits

17 Do you crave any foods? Yes No

If so, please specify: _____

18. How is your appetite affected by stress? increased not affected decreased

19. Do you drink alcohol? Yes No How often? _____times per week Average amount? _____glasses

20. Do you drink caffeinated beverages? Yes No Average number per day: _____

21. Do you use tobacco? Yes No How much (cigarettes, cigars, or chewing tobacco per day)? _____

22. Do you take any vitamin, mineral, or herbal supplements? Yes No

Please list type and amount per day: _____

23. Do you currently participate in any structured physical activity? Yes No

If so, please describe: ___minutes of cardiovascular activity, ___times per week

___strength-training sessions, ___times per week

___minutes of flexibility training, ___times per week

___minutes of sports per week

24. Do you engage in any other forms of regular physical activity? _____

Please describe your activity level during the workday: _____

25. Have you experienced any injuries that may limit your physical activity?

If so, please describe: _____

Allergies

(Specify: _____)

Check if any of the following apply:

Amenorrhea

Anemia

Anxiety

Arthritis

Asthma

Celiac disease

Chronic sinus condition

Constipation

Crohn's disease

Depression

Diabetes

Diarrhea

Disordered eating

Gastroesophageal reflux disease (GERD)

High blood pressure

Hypoglycemia

Hypo/hyperthyroidism

Insomnia

Intestinal problems

Irritability

Irritable bowel syndrome (IBS)

Menopausal symptoms

Osteoporosis

Premenstrual syndrome (PMS)

- Polycystic ovary syndrome (PCOS)
- Pregnant
- Ulcer
- Skin problems
- Major surgeries: _____
- _____
- Past injuries: _____
- Describe any other health conditions that you have: _____
- _____
- _____

III: Readiness to Change Questionnaire

Question	Yes	No
Are you looking to change a specific behavior?		
Are you willing to make this behavioral change a top priority?		
Have you tried to change this behavior before?		
Do you believe there are inherent risks/dangers associated with not making this behavioral change?		
Are you committed to making this change, even though it may prove challenging?		
Do you have support for making this change from friends, family, and loved ones?		
Besides health reasons, do you have other reasons for wanting to change this behavior?		
Are you prepared to be patient with yourself if you encounter obstacles, barriers, and/or setbacks?		

Weight Loss Readiness Quiz

Are you ready to lose weight? Your attitude about weight loss affects your ability to succeed. Take this Weight-loss Readiness Quiz to learn if you need to make any attitude adjustments before you begin. Mark each item true or false. Please be honest! It's important that these answers reflect the way you really are, not how you would like to be. A method for interpreting your readiness for weight loss follows:

Question	True	False
1. I have thought a lot about my eating habits and physical activities to pinpoint what I need to change.		
2. I have accepted the idea that I need to make permanent, not temporary, changes in my eating and activities to be successful.		
3. I will only feel successful if I lose a lot of weight		
4. I accept the idea that it's best if I lose weight slowly.		
5. I'm thinking of losing weight now because I really want to, not because someone else thinks I should.		
6. I think losing weight will solve other problems in my life.		
7. I am willing and able to increase my regular physical activity.		
8. I can lose weight successfully if I have no "slip-ups."		
9. I am ready to commit some time and effort each week to organizing and planning my food and activity programs.		
10. Once I lose some initial weight, I usually lose the motivation to keep going until I reach my goal.		
11. I want to start a weight-loss program, even though my life is unusually stressful right now.		

Scoring the Weight Loss Readiness Quiz

- To score the quiz, look at your answers next to items 1, 2, 4, 5, 7, and 9. Score "1" if you answered "true" and "0" if you answered "false."
- For items 3, 6, 8, 10, and 11, score "0" for each true answer and "1" for each false answer.
- To get your total score, add the scores of all questions.
- No one score indicates for sure whether you are ready to start losing weight. However, the higher your total score, the more characteristics you have that contribute to success. As a rough guide, consider the following recommendations:
 - If you scored 8 or higher, you probably have good reasons for wanting to lose weight now and a good understanding of the steps needed to succeed. Still,

- you might want to learn more about the areas where you scored a “0” (see “Interpretation of Quiz Items” below).
- If you scored 5 to 7, you may need to reevaluate your reasons for losing weight and the methods you would use to do so. To get a start, read the advice given on the next page for those quiz items where you received a score of “0.”
 - If you scored 4 or less, now may not be the right time for you to lose weight. While you might be successful in losing weight initially, your answers suggest that you are unlikely to sustain sufficient effort to lose all the weight you want or keep off the weight that you do lose. You need to reconsider your weight-loss motivations and methods and perhaps learn more about the pros and cons of different approaches to reducing. To do so, read the advice on the next page for those quiz items where you scored “0.”

Interpretation of QUIZ Items

Your answers to the quiz can clue you in to potential stumbling blocks to your weight-loss success.

Any item score of “0” indicates a misconception about weight loss, or a potential problem area. While no individual item score of “0” is important enough to scuttle your weight-loss plans, you should consider the meaning of those items so that you can best prepare yourself for the challenges ahead. The numbers below correspond to the question numbers.

1. It has been said that you can’t change what you don’t understand. You might benefit from keeping records for a week to help pinpoint when, what, why, and how much you eat. This tool also is useful in identifying obstacles to regular physical activity.
2. Making drastic or highly restrictive changes in your eating habits may allow you to lose weight in the short-run but be too hard to live with permanently. Similarly, your program of regular physical activity should be one you can sustain. Both your food plan and activity program should be healthful and enjoyable.
3. Most people have fantasies of reaching a weight considerably lower than they can realistically maintain. Rethink your meaning of “success.” A successful, realistic weight loss is one that can be comfortably maintained through

- sensible eating and regular activity. Take your body type into consideration. Then set smaller, achievable goals. Your first goal may be to lose a small amount of weight while you learn eating habits and activity patterns to help you maintain it.
4. If you equate success with fast weight loss, you will have problems maintaining your weight. This “quick fix” attitude can backfire when you face the challenges of weight maintenance. It’s best—and healthiest—to lose weight slowly, while learning the strategies that allow you to keep the weight off permanently.
 5. The desire for, and commitment to, weight loss must come from you. People who lose and maintain weight successfully take responsibility for their own desires and decide the best way to achieve them. Once this step is taken, friends and family are an important source of support, not motivation.
 6. While being overweight may contribute to several social problems, it is rarely the single cause. Anticipating that all your problems will be solved through weight loss is unrealistic and may set you up for disappointment. Instead, realize that successful weight loss will make you feel more self-confident and empowered, and that the skills you develop to deal with your weight can be applied to other areas of your life.
 7. Studies have shown that people who develop the habit of regular, moderate physical activity are most successful at maintaining their weight. Exercise does not have to be strenuous to be effective for weight control. Any moderate physical activity that you enjoy and will do regularly counts. Just get moving!
 8. While most people don’t expect perfection of themselves in everyday life, many feel that they must stick to a weight-loss program perfectly. This is unrealistic. Rather than expecting lapses and viewing them as catastrophes, recognize them as valuable opportunities to identify problem triggers and develop strategies for the future.
 9. Successful weight loss is not possible without taking the time to think about yourself, assess your problem areas, and develop strategies to deal with

- them. Success takes time. You must commit to planning and organizing your weight loss.
10. Do not ignore your concerns about “going the distance,” because they may indicate a potential problem. Think about past efforts and why they failed. Pinpoint any reasons, and work on developing motivational strategies to get you over those hurdles. Take your effort one day at a time; a plateau of weight maintenance within an ongoing weight-loss program is perfectly okay.
 11. Weight loss itself is a source of stress, so if you are already under stress, it may be difficult to successfully implement a weight-loss program at this time. Try to resolve other stressors in your life before you begin a weight-loss effort.

IV. Our Coaching Commitment

This Agreement is entered into by and between: Positive Performance Coach, LLC, (Coach Marilyn Gansel, PsyD certified life coach, body/mind wellness coach, and ACC credentialed with International Coaching Federation) and

Name _____ Address _____

whereby Coach agrees to provide Coaching Services for Client focusing on the following topics/results/outcomes/goals attached to this Agreement as Schedule A.

Description of Coaching: Coaching is partnership (defined as an alliance, not a legal business partnership) between the Coach and the Client in a thought-provoking and creative process that inspires the client to maximize personal and professional potential. It is designed to facilitate the creation/development of personal, professional, or business goals and to develop and carry out a strategy/plan for achieving those goals.

1) Coach-Client Relationship:

- A. Coach agrees to maintain the ethics and standards of behavior established by the International Coaching Federation “(ICF)”. www.coachingfederation.org/ethics. It is recommended that the Client review the ICF Code of Ethics and the applicable standards of behavior.
- B. The client is solely responsible for creating and implementing his/her own physical, mental, and emotional well-being, decisions, choices, actions, and results arising out of or resulting from the coaching relationship and his/her coaching calls and interactions with the Coach. As such, the Client agrees that the Coach is not and will not be liable or responsible for any actions or inaction, or for any direct or indirect result of any services provided by the Coach. Client understands coaching is not therapy and does not substitute for therapy if needed, and does not prevent, cure, or treat any mental disorder or medical disease.
- C. The client further acknowledges that he/she may terminate or discontinue the coaching relationship at any time.

- D. The client acknowledges that coaching is a comprehensive process that may involve different areas of his or her life, including work, finances, health, relationships, education, and recreation. The Client agrees that deciding how to handle these issues, incorporate coaching principles into those areas and implementing choices is exclusively the Client's responsibility.
- E. The client acknowledges that coaching does not involve the diagnosis or treatment of mental disorders as defined by the American Psychiatric Association and that coaching is not to be used as a substitute for counseling, psychotherapy, psychoanalysis, mental health care, substance abuse treatment, or other professional advice by legal, medical, or other qualified professionals and that it is the Client's exclusive responsibility to seek such independent professional guidance as needed. If Client is currently under the care of a mental health professional, it is recommended that the Client promptly inform the mental health care provider of the nature and extent of the coaching relationship agreed upon by the Client and the Coach.
- F. The client understands that to enhance the coaching relationship, the Client agrees to communicate honestly, be open to feedback and assistance and to create the time and energy to participate fully in the program.

2) Services:

The parties agree to engage in a [] month Coaching Program through (describe method(s), e.g., in-person, internet, telephone) _____ meetings. Coach will be available to Client by e-mail and voicemail in between scheduled meetings as defined by the Coach (describe those terms here). Coach may also be available for additional time, per Client's request on a prorated basis rate of [] \$100.00 (for example, reviewing documents, reading, or writing reports, engaging in other Client related services outside of coaching hours).

3) Schedule & Fees:

This coaching agreement is valid as of []/ []/ []. The fee is [] (amount in advance if applicable) and/or [] (amount) per month based on (frequency of meetings such as # of meetings per/ wk, month, etc.).

The calls/meetings shall be 30 minutes at the signing of this agreement.

Client may terminate or discontinue the coaching relationship at any time. The refund policy in effect for the term of this Agreement is as follows: **there is no refund; termination of this Agreement must be made in writing 1 month prior to termination and client is responsible for the month prior to termination.**

4) Procedure:

The time of the coaching meetings and/or location will be determined by Coach and Client based on a mutually agreed upon time. The Coach will initiate all scheduled calls by email with a Zoom invite and/or will call the Coach scheduled meetings by phone or in person mutually agreed by both parties. If the Coach will be at any other number for a scheduled call, Client will be notified prior to the scheduled appointment time.

5) Confidentiality:

This coaching relationship, as well as all information (documented or verbal) that the Client shares with the Coach as part of this relationship, is bound by the principles of confidentiality set forth in the ICF Code of Ethics. However, please be aware that the Coach-Client relationship is not considered a legally confidential relationship (like the medical and legal professions) and thus communications are not subject to the protection of any legally recognized privilege. The Coach agrees not to disclose any information pertaining to the Client without the Client's written consent. The Coach will not disclose the Client's name as a reference without the Client's consent.

Confidential Information does not include information that: (a) was in the Coach's possession prior to its being furnished by the Client; (b) is generally known to the public or in the Client's industry; (c) is obtained by the Coach from a third party, without breach of any obligation to the Client; (d) is independently developed by the Coach without use of or reference to the Client's confidential information; or (e) the Coach is required by statute, lawfully issued subpoena, or by court order to disclose; (f) is disclosed to the Coach and

as a result of such disclosure the Coach reasonably believes there to be an imminent or likely risk of danger or harm to the Client or others; and (g) involves illegal activity. The Client also acknowledges his or her continuing obligation to raise any confidentiality questions or concerns with the Coach in a timely manner.

6) Privacy/Data Protection

- A. The Coach and the Client will each of them comply as appropriate with applicable privacy/data protection legislation (including GDPR), binding court order, judgment or decree, guidance, codes, policy, or standards.

- B. With regard to processing personal data/personal identifiable information (“data”) in relation to the Client, the Coach will: process such data lawfully (on an appropriate basis including but not limited to consent, or to comply with the Coach’s legal or regulatory obligations, or for contractual performance, or for the Coach’s legitimate interests), fairly and in a transparent manner; collect such data for specified, explicit and legitimate purposes and not further process such data in a manner that is incompatible with those purposes; ensure that such data is adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed; maintain such data accurately; keep such data for no longer than is necessary for the purposes for which the data are processed; process such data in a manner that ensures appropriate security of the data, including protection against unauthorized or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organizational measures; maintain records of such data processing under applicable privacy/data protection legislation requirements; share such data with third parties who the Coach will inform the Client about; concerning such data, observe the Client’s privacy/data protection rights under applicable privacy/data protection legislation requirements, which may be subject to some conditions and exceptions; process such data for marketing purposes under applicable privacy/data protection legislation requirements; in case of a security breach concerning such data, where requirements of applicable privacy/data protection legislation are met, notify a regulatory or supervisory authority, board or other body

responsible for administering privacy/data protection legislation, and the Client of the data security breach; and, where it is necessary for the Coach to transfer such data internationally the Coach will comply with applicable privacy/data protection legislation requirements designed to ensure the privacy of such data.

- C. In connection with any infringement by the Coach of applicable privacy/data protection legislation requirements, including a security breach, concerning personal data/personal identifiable information in relation to the Client, the Coach's entire liability under this Agreement and the Client's exclusive remedy shall be limited to the amount actually paid by the Client to the Coach under this Agreement for all coaching services rendered through and including the termination date.

7) Release of Information: (Optional, based upon specific situation)

The Coach engages in training and continuing education pursuing and/or maintaining ICF (International Coach Federation) Credentials. That process requires the names and contact information of all Clients for possible verification by the ICF. By signing this agreement, you agree to have only your name, contact information, and start and end dates of coaching shared with ICF staff members and/or other parties involved in this process for the sole and necessary purpose of verifying the coaching relationship, no personal notes will be shared.

Client Agrees _____ Client Refuses _____

According to the ethics of our profession, topics may be anonymously and hypothetically shared with other coaching professionals for training, supervision, mentoring, evaluation, and for coach professional development and/or consultation purposes.

8) Cancellation Policy:

Client agrees that it is the Client's responsibility to notify the Coach 24 hours in advance of the scheduled calls/meetings. Coach reserves the right to bill Client for

a missed meeting. Coach will attempt in good faith to reschedule the missed meeting.

9) Record Retention Policy:

The Client acknowledges that the Coach has disclosed his/her record retention policy with respect to documents, information and data acquired or shared during the term of the Coach-Client relationship. Such records will be maintained by the Coach in a format of the Coach's choice (print or digital/electronic) for a period of not less than 7 years.

10) Termination:

Either the Client or the Coach may terminate this Agreement at any time with 4 weeks written notice. Client agrees to compensate the Coach for all coaching services rendered through and including the effective date of termination of the coaching relationship.

11) Limited Liability:

Except as expressly provided in this Agreement, the Coach makes no guarantees, representations or warranties of any kind or nature, express or implied with respect to the coaching services negotiated, agreed upon and rendered. In no event shall the Coach be liable to the Client for any indirect, 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, shall be limited to the amount actually paid by the Client to the Coach under this Agreement for all coaching services rendered through and including the termination date.

12) Entire Agreement:

This document reflects the entire agreement between the Coach and the Client and reflects a complete understanding of the parties with respect to the subject matter. This Agreement supersedes all prior written and oral representations. The Agreement may not be amended, altered or supplemented except in writing signed by both the Coach and the Client.

13) Dispute Resolution:

If a dispute arises out of this Agreement that cannot be resolved by mutual consent, the Client and Coach agree to attempt to mediate in good faith for up to (certain

amount of time such as 30 days) after notice given. If the dispute is not so resolved, and in the event of legal action, the prevailing party shall be entitled to recover attorney's fees and court costs from the other party.

14) Severability:

If any provision of this Agreement shall be held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable. If the Court finds that any provision of this Agreement is invalid or unenforceable, but that by limiting such provision it would become valid and enforceable, then such provision shall be deemed to be written, construed, and enforced as so limited.

15) Waiver:

The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Agreement.

16) Applicable Law:

This Agreement shall be governed and construed in accordance with the laws of the State of _____, without giving effect to any conflicts of laws provisions.

17) Binding Effect:

This Agreement shall be binding upon the parties hereto and their respective successors and permissible assigns.

Please sign both copies and return one copy of this Client Agreement prior to the first scheduled coaching meeting. Retain one copy for your records and mail the other to:

Coach and Address: Marilyn Gansel, 7635 Campus Cove, Sarasota, FL 34243

CLIENT:

Name _____

Address _____

Signature: _____ Date: _____

Coach/ for Positive Performance Coach, LLC

Name _____

Title _____

Signature: _____ Date: _____

The Most Important Thing

Be ready to explore, expand, and evolve into YOU on your own terms. I promise to support you, cheer you on, and challenge you in every way that I know.