

# *The Coaching Exchange*

## Pilot Program Terms and Conditions

### **A Capstan Partners Pty Ltd Initiative**

Effective Date: 10th July 2025

Name: The Coaching Exchange - Pilot Program

These Terms and Conditions ("Terms") govern the participation of both Coaches and Clients ("Participants") in "The Coaching Exchange Pilot" ("the Pilot"), which facilitates affordable and accessible professional coaching in the Australian healthcare workplace context. Clients can also be known as coachees (these terms are interchangeable).

This Pilot will inform future projects and the Pilot will be conducted and evaluated over a 6 month period. These terms and conditions are limited to the Pilot and its duration.

---

## 1. Definitions

- Coach: An appropriately trained individual offering professional coaching
- Client/Coachee: An individual receiving coaching
- Organisation: an organisation or health service who may purchase client access to the Pilot on behalf of their employees
- Match: The pairing of a Coach and a Client for the purpose of engaging in coaching sessions. This match is conducted by Capstan Partners Pty Ltd.
- ABN/NZABN: Business Number , as required for Coaches providing services
- Coach Mentor: is an ICF credentialed coach with >500 hours of coaching experience, who provides development-focused support to participating coaches

## 2. Eligibility to Participate

### 2.1 Coaches

In order to be eligible to participate in this Pilot, Coaches are required to :

- Be employed in healthcare or be a healthcare professional working clinically
- Hold evidence-based coaching education: a minimum of 60 hours of coaching education for Bronze level entry or minimum of 125 hours of coaching education for Silver level entry. (There is no specified minimum requirement of mentor coaching/supervision, however having received mentor coaching/supervision would be favourably viewed during the Expression of Interest)
- Have and maintain their own professional indemnity insurance (specifically covering coaching)
- Agree to disclose any potential or actual conflicts of interest, including those arising from secondary employment or other business interests, upon successful inclusion in the Pilot

- Take full responsibility for managing any employer permissions or obligations related to secondary employment
- Be solely responsible for declaring and paying any applicable taxes on income earned, including GST and income tax as required by the Australian Taxation Office (ATO)
- Provide a valid ABN
- Commit to requirements of the Pilot, specifically:
  - Undertaking a 20 minute introductory meeting with each client before commencing coaching
  - Attending a minimum of 2 out of 3 mentoring sessions offered
  - Completing the intake and evaluation feedback forms
  - Having access to videoconferencing software and a computer
  - Being responsible for scheduling the sessions with the client
  - Completing the Expression of Interest application form and if successful, completing the onboarding process, which includes providing and consenting use of a photo and bio for online publication
  - Pay the Fee (\$AUD) within 7 days upon confirmation of your successful application.

Preference will be given to applicants with ICF, EMCC or AC Membership

## 2.2 Clients

In order to be eligible to participate in this Pilot, Clients are required to:

- Be individuals seeking coaching for professional development within an Australian or New Zealand healthcare workplace
- Have access to videoconferencing software and computer
- Provide accurate and complete information regarding goals and expectations
- Complete the Expression of Interest,
- Agree to complete intake and evaluation processes if successful
- Pay the Fee (\$AUD) within 7 days upon confirmation of successful application to participate.

## 2.3 Organisations

In order to be eligible to participate in this Pilot, Organisations are required to:

- Nominate individual employees who meet the eligibility criteria outlined in Section 2.2 on an opt into basis. Coaching must not be mandated as a condition of employment or performance improvement or management.
- Ensure nominated clients are aware of and agree to the program requirements, specifically having read these Terms & Conditions.
- Cover the applicable coaching Fee(s) for nominated clients, payable within 7 days of confirmation of a successful Expression of Interest
- Support clients to participate fully, including allowing time for sessions and reflection as part of broader professional development and support a learning/growth mindset.
- Encourage completion of evaluation and feedback processes
- Agree not to influence the coaching sessions, client-coach relationship or seek access to the content of coaching conversations
- Designate a contact person for Pilot coordination and communication

- Where applicable, collaborate on a co-branded case study or outcomes summary
- Accept that the coaching sessions between coach and coachee are entirely confidential and private, for further details refer to Section 5.

### 3. Matching Process

- Capstan Partners Pty Ltd facilitates the matching of Clients with Coaches based on availability, preferences, and coaching focus areas
- Participants will be matched with those working in different locations and/or health speciality
- A match does not guarantee compatibility, and either party may terminate the coaching relationship as per Section 6.
- A secondary match will take place if the first match is unsuccessful
- In the unlikely event that a secondary match is also unsuccessful, clients will be offered the choice to participate in Phase Two of The Coaching Exchange. No refunds will be available.

### 4. Code of Conduct

#### 4.1 For Coaches

Coaches agree to:

- Uphold the highest standards of professional and ethical conduct, specifically adhering to the ICF's code of ethics, [available here](#)
- Comply with all applicable laws and regulations, including privacy, anti-discrimination, workplace health and safety, and tax obligations.
- Refrain from entering into dual relationships or situations that may lead to a conflict of interest, including conflicts arising from secondary employment or external contracts.
- Ensure that participation in coaching does not breach their primary employment terms or professional codes of conduct.
- Hold valid professional indemnity for the duration of their participation in the pilot.
- Maintain confidentiality as outlined in Section 5.
- Complete all pre and post-pilot evaluation forms

#### 4.2 For Clients

Clients agree to:

- Engage in the coaching process with honesty, openness, and mutual respect
- Provide timely feedback and communicate openly about the effectiveness of coaching
- Report any concerns about the coaching relationship to the Program Lead
- Complete all pre and post-pilot survey and evaluation forms

### 4.3 For Organisations

Organisations agree to:

- Uphold ethical boundaries to ensure organisational representative(s) maintain a clear boundary between administrative support and the coaching relationship
- Respect Pilot constraints and acknowledge that this is a time-limited pilot with scope limitations.
- Provide feedback on the program's structure or outcomes, constructively and with an understanding of the experimental nature of a pilot.

## 5. Confidentiality and Privacy

- Both parties agree to maintain the confidentiality of information shared during coaching sessions, except where disclosure is required by law (e.g., risk of harm).
- All personal data collected will be handled in accordance with the Australian Privacy Principles (APPs).
- Identifiable data (e.g. names, contact details) will be held securely for the duration of the Pilot and one year after pilot completion to administer the pilot and evaluate.
- Deidentified and aggregated data (e.g satisfaction, feedback scores and evaluation data) will be held in perpetuity and may be used in academic publication or conference presentations.

## 6. Termination of Engagement

- Either the coach or the client may end a coaching relationship at any time, for any reason, by providing written notice to the other party and the Program Lead and for the Organisation, to the Program Lead. In the unlikely event that a coach or client terminates the coaching relationship part-way through the coaching, the remaining sessions are forfeited. Further details are available in the Coaching Agreement.
- Capstan Partners Pty Ltd reserves the right to terminate or suspend participation by any party in the event of:
  - Breach of these Terms
  - Unprofessional or unethical behaviour
  - Legal or regulatory issue

## 7. Fees and Payments

- Capstan Partners Pty Ltd will pay coaches for coaching that has been delivered to a client, as per the schedule provided, within 14 days of receiving an invoice on program completion
- There are no cooling off periods applicable
- Refunds are not available for under any circumstances under this agreement

## 9. Liability and Disclaimer

- Capstan Partners Pty Ltd are not responsible for the coaching process, content or outcome of coaching sessions.
- Coaches operate as independent service providers, not employees of Capstan Partners Pty Ltd

- To the fullest extent permitted by law, Capstan Partners Pty Ltd disclaims all liability for any loss, damage, or injury incurred through coaching services provided.

## 10. Governing Law

These Terms shall be governed by the laws of the Commonwealth of Australia and the relevant state or territory in which the coach or client resides.

## 11. Amendments

Capstan Partners Pty Ltd reserves the right to amend these Terms at any time. Notice of amendments will be provided via email. Continued use of the Pilot after such notice constitutes agreement to the updated Terms.

## 12. Next Steps - Apply Now - *limited places available*

Please fill out the appropriate Expression of Interest form linked below.

### For Coaches - Ready to Begin?

Having read The Coaching Exchange - Coach Information sheet, accepted the terms and conditions and taken the opportunity to ask any questions, please [express your interest to participate here](#). You will be advised of the outcome of your EOI. If successful you will be invited to our onboarding process. Upon payment being received you can then book a virtual introductory meeting with your matched coachee(s). A copy of The Coaching Exchange - Coach Information sheet will be attached to your invoice. The start-up is simple and quick!

### For Coachees/Clients - Ready to Begin?

Having read The Coaching Exchange - Coachee Information sheet, accepted the terms and conditions and taken the opportunity to ask any questions, please [express your interest to participate here](#). You will be advised of the outcome of your EOI. If successful you will be invited to our onboarding process. A copy of The Coaching Exchange - Coachee Information sheet will be attached to your invoice. Upon payment being received your coach will be in touch to book your virtual introductory meeting. The start-up is simple and quick!

### For Organisations - Ready to Begin?

Please book a meeting [using this link](#).

For questions about these Terms and Conditions please contact [info@capstan.com.au](mailto:info@capstan.com.au)