

Developing Forms and Contracts



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Standardizing and Clarifying Through Forms and Contracts

- For members/clients, in example:
 - PAR-Q+
 - Membership contracts
 - Waivers
- For employees, in example:
 - W-4 (fed income tax withholding)
 - I-9 (employment eligibility verification)



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Forms

- Forms are informational tools that standardize
 - Giving information (i.e. check-in procedures)
 - Gathering information (i.e. medical health history)
 - Getting permission (i.e. informed consent)
 - Getting commitment (i.e. membership contract)



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Client Forms



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PAR-Q+ Form

- Risk assessment for know disease or symptoms
- Minimum for health information gathering
- “+” is the newer version that allows for more options when a “positive” is checked



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Health History and Activity History/Lifestyle Questionnaire

- Health History, beyond the PAR-Q+, gives you the rest of the story
 - Cardiovascular risk factors
 - Family history
 - More physical conditions and injuries
 - Etc.



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Health History and Activity History/Lifestyle Questionnaire

- Activity History/Lifestyle Questionnaire
 - Goals
 - History in trying to reach their goals
 - Past obstacles
 - Current lifestyle habits
 - Etc.



*Suggestion: Combine documents for simplicity
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Physician's Clearance Form

- IF either the PAR-Q+ or the health history forms indicate that the client should get a physician's clearance to begin an exercise/movement program, you should have a form prepared to get in writing what, precisely, the client's limitations are.
- Make sure you also get the doctor's name (printed) and contact information in case you need clarity or



want to report back.
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Informed Consent Form

- Also referred to as "primary assumption of risk"
- Describes the activity
- Describes the benefits and risks involved in participation
- They must "know, understand, and appreciate the inherent risks, and voluntarily participate in the activity"
- That is in the signing of the form



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Waivers

- Don't cover the inherent risk, but rather covers claims of negligence. This includes:
 - Things that someone should have done, but didn't (not calling 911 when they should)
 - Things that someone shouldn't have done, but did (non-RD offering specific meal plans to person with metabolic disease)



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Informed Consent Form/Waivers

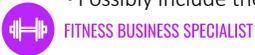
*Suggestion: Combine documents for simplicity
However, two separate signatures.



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Guest Forms

- Should serve multiple purposes
 - Informed consent
 - Waiver
 - Marketing Analysis (how did you hear about us)
 - Lead generation (email address, phone, social media)
 - Emergency contacts
 - Possibly include their goals to help guide them



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Assessment Forms

- If there are separate fitness assessments to be done, separate informed consent forms detailing the assessments should be included.
- Forms to record all assessment results



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Employee Forms



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Initial Employment Documentation

- 3 Primary forms:
 - Compensation agreement as to how much and how often the employee will be paid
 - **W-4** (employee's withholding allowance certificate)
 - **I-9** (employment eligibility verification)



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Emergency Procedure Protocols

- Document that outlines precisely what to do in case of emergency. All employees should know and get an opportunity to practice these.
- All employees should get a copy of these as well as being posted in a prominent place in the club



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Accident and Injury Reports

- Along with know emergency procedures, employees all need to know how to fill out and file an accident/injury report
- Detailed documentation is critical in case any litigation is brought against the company or its staff



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Other Forms and Reports

- There are endless options here and what else is included will be dependent on the individual business' needs



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Contracts
 Legally binding written agreements
 between two or more parties



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Membership Contracts

- Provide information
- Establish obligations (on both sides)
- Can be a source of ill will
 - Contracts tend to be for extended lengths of time (i.e. one year or more) and may include penalties for breaking it early
- May be challenging and stressful to get out of.



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Membership Contracts

- Tend to be very wordy and written in legalese when it doesn't need to be.

*If choosing to use a member contract, ("no contracts" is actually a selling point) make it simpler, shorter, easier to understand.



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Personal Training Contracts

- Provide information
- Establish obligations (on both sides) such as:
 - Fees
 - Cancellation policy
 - Client late arrival
 - Trainer late arrival



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Common Contracts

- Real estate leases
- Equipment leases
- Independent contractor contracts
 - *Remember that a contract does not give the hiring party the right to dictate how things are done



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Standardizing and Clarifying Through Forms and Contracts

- Gather needed information
- Give information and...
- Sets expectations



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Upcoming Discussions: Learning & Applying Business Skills

- Determining Your Offerings and Their Pricing ✓
- Developing Forms and Contracts ✓
- Becoming Profitable



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