Call #1 Notes:

Ethics and Establishing the Coaching Agreement

In our first call, we will begin the process of going through the Competency Model, element by element. For each Competency, you will:

- Understand, in more detail, the PBC competency, and what we intend
- Understand any significant differences between the ICF competency and ours
- Self-assess yourself against the specific competencies in our model
- Have the opportunity to discuss, and practice, the competency
- Identify practices, self-observations or other fieldwork for your outside coaching

The competency models can feel a bit overwhelming, and there IS a lot of information. Please use this to practice being a learner… watch your narratives, center yourself, engage with the information in ways that are most relevant and useful for you. We will be breaking these models down into chunks, and supporting you in a systematic way to explore and develop confidence.

Of course, this work on the rigor end of the polarity will be greatly supported by your somatic practices, centering yourself, and good self-care!

Pre-work

All documents are housed at http:// presencebasedcoaching.com/students/lipcc-program-materials. Before our call, please:

- Print out and review this PDF for the call
- Review the specific sections of the PCC Exam Standards on Ethics and Establishing the Coaching Agreement
- Review the section of the PBC Competency Model on Ethics and Establishing the Coaching Agreement
- Review pages 4-7 in LIPCC manual – ICF Ethics
- Note any pressing questions or areas of confusion
- Take the self-assessment below

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Competency #1: Meeting Ethical Guidelines and Professional Standards

> **ICF language:** As an ICF coach, I acknowledge and agree to honor my ethical and legal obligations to my coaching clients and sponsors, colleagues, and to the public at large. I pledge to comply with the ICF Code of Ethics and to practice these standards with those whom I coach, teach, mentor or supervise.

If I breach this Pledge of Ethics or any part of the ICF Code of Ethics, I agree that the ICF in its sole discretion may hold me accountable for so doing. I further agree that my accountability to the ICF for any breach may include sanctions, such as loss of my ICF Membership and/or my ICF Credentials.

a. Understands and exhibits in own behaviors the ICF Standards of Conduct

b. Understands and follows all ICF Ethical Guidelines

c. Clearly communicates the distinctions between coaching, consulting, psychotherapy and other support professions

d. Refers client to another support professional as needed, knowing when this is needed and the available resources

This competency is tested on the written ICF exam, and includes the coach's understanding and demonstration of coaching ethics and standards, and the ability to apply them appropriately in coaching situations. Commitment to the ICF Code of Ethics is required for ICF credentials and membership. See ICF website for more details.

Competency #2: Establishing the Coaching Agreement (Partner)

> **ICF Language:** Ability to understand what is required in the specific coaching interaction and to come to agreement with the prospective and new client about the coaching process and relationship.

This includes understanding and ability to communicate clearly with the client the parameters of the overall engagement, elements of the coaching relationship, and the focus and bounds of coaching. We also determine at the beginning of each conversation what the client wants out of the conversation, and how we can address it together.

There are two levels to this agreement. The first is the overall engagement process that we practiced in LIPCC: how to hold exploratory, intake and contracting conversations with a focus on shaping the overall arc of the relationship.

The second is at the session level: working with the shape of each session, skillfully partnering with the client around the process and outcomes of that session. Establishing the coaching agreement for each session helps delineate a clear entry and completion, like bookends, on the session. The agreement sets up the work that happens within those bookends.

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Presence-Based Coaching Language at LIPCC/PCC Level: Coach asks about client's desired focus and outcomes, and explores and clarifies conditions of satisfaction. Builds agreement about the session process itself, and clarifies boundaries and responsibilities. Asks client about takeaways at end.

a. Asks, and builds agreement around, the focus, scope, process, and/or specific outcomes for the coaching conversation.

This step happens up front, after entering the session space together. Operationally the coach asks the client what topic or focus they want to address. This topic should be within the overall scope agreed to in the contracting phase. That said, it will also be dependent on what's going on for the client, and how the coach can provide support.

This involves awareness on the coach's part of how to narrow the focus of work for the session, if needed. It's important that the focus be clear, and that it be the client's agenda, not the coach's. Skillful agreements consider what is possible in the time frame, the overall coaching outcomes, and the learning style of the client. They also are grounded in the client's authority, and will generally include some investigation about the focus and process, giving the client the ultimate choice.

The second part of Establishing the Coaching Agreement in a session, after specifying the area for today's work, is asking the client what they would like to be different at the end of the session – for a session outcome, so to speak. This question asks the client to inquire onto what is most important, and puts them "in gear" for the work of the session.

The third piece of creating the agreement is to ask the client how will they know they got to their desired outcome by the end of the session, how they shifted in perspective, etc. How will they measure this (even if it's internal)?

b. Makes the coaching process itself transparent, educating client about process

Coach is aware of and skillfully shares rationales for using certain models or frameworks, and explains briefly what models or framework are in use if it seems helpful/relevant to the client's understanding and choice, or the client requests it. Joint design of how to move forward is most important, so that the client owns and co-designs the process itself.

c. Holds the focus of the coaching agreement, or makes joint decisions to depart from it

The coach holds the structure of the coaching agreement, within which the exploration, movement and direction of the session are co-created by both coach and client. This has the look and feel of the butterfly dance, and is informed by emergent data in the session. Coach is open to various choice points, and checks in with client along the way to offer or ask for possible options for moving forward.

d. Asks client, on completion, to assess results of conversation against agreement

Coach circles back near the end of the session to review the focus/area for work, the outcome and the measure. The coach might summarize back these items for the client, and ask "how

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did we do?" This also might include asking the client to summarize key takeaways from the session, or asking "what did you learn here or what is different now than when we started today?" If the conversation went off-track, there's an opportunity to notice how that happened, and for both coach and client to self-observe (habits, for example.) This can reveal rich material for future coaching sessions.

Self-Assessment

Please do a self-assessment, considering your coaching skills in relation to the descriptions of Presence-Based Coaching competencies, as organized in the ICF framework. Rate yourself, 1-5, against the detailed competencies below. The ICF Summary is the ICF language for the overall competency; the italicized items are the specific PBC descriptions that evidence this competency at the PCC/LIPCC level.

Please rate yourself on a scale of 1 to 5:

1 indicates that you do not use this competency well. (Perhaps because you are not familiar or comfortable with it. Or, you overuse it to the degree that it gets in the way).

5 indicates a high level of proficiency in using the competency, and you do not overuse it out of habit. You can move fluidly in and out of this as needed.

2: Establishing the Coaching Agreement (Partner)		
Competency Detail	**Rate**	**Your Comments**
Summary: Ability to understand what is required in this specific coaching interaction and to come to agreement with the prospective/new client about the coaching process and relationship		
a. Asks, and builds agreement around, the focus, scope, process, and/or specific outcomes for the coaching conversation		
b. Makes the coaching process itself transparent, educating client about process		
c. Holds the focus of the coaching agreement, or makes joint decisions to depart from it		
d. Asks client, on completion, to assess results of conversation against agreement		

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Application Notes, Fieldwork, or Commitments to Self

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Establishing the Coaching Agreement
Sample Questions

1. **Clarifying the focus for the session**
   - What's most pressing on your agenda?
   - What needs attention today?
   - What's most helpful to work on in our time together?
   - What's the essence of what the current issue is?
   - If you check inside, what surfaces as the most important issue to address today?
   - Out of these three topics you identified, what seems most relevant to work with now?
   - What would be the next area for work in coaching?
   - What are you most aware of that you'd like to work with now?
2. **Ask what client wants as the outcome by the end of the session**
   - What would success look like?
   - What would you like to leave with today?
   - What would have been helpful by the end of our time together?
   - What would be a good outcome for this topic or exploration?
   - What would you like to be different by the end of the session?
3. **Client establishes measure**
   - Feels relief or relaxed
   - Sees something new
   - Has an "aha" or insight
   - Perceives new possibilities
   - Feels energized or somatically shifted around action
   - Has a list or a plan
   - Has a new direction for further exploration
   - Feels ready to take the next step
4. **Circle back and check in at the end**
   - How did we do?
   - What do you notice about these now?
   - What are your takeaways?
   - What did you learn about this today?
   - What's your assessment of where we landed, or of your progress?
   - Where did we end up?
   - What's different now than from before?
5. **Ask questions that link to measures:**
   - How do you know if we reached your measure?
   - What's the evidence for this?

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