Coaching & Mentoring 'Supervision' Project

This document is produced in three parts with parts one and two having a content index:

Part One – SSG collation of main themes from Stakeholder Group feedback

Part Two – Stakeholder Group feedback

Part Three – SSG audioconference notes

Final Document – Part ONE

SSG collation of main themes from Stakeholder Group feedback

24 December 2008

Project Background

The purpose of this project was to produce outcomes of benefit to the coaching industry around the topic of supervision. There was a real intent to collaborate across the coaching and mentoring professional bodies. From the start of the project there was encouragement to work towards a core collective agreement with acceptance that individual bodies were likely to have different internal application of the material produced. The following provides a brief 'history' on the background to the project.

The Professional Coaching Bodies roundtable has representatives from AC, APECS, CIPD, EMCC and ICF who meet regularly to discuss topics of mutual interest and benefit to the coaching industry. Neil Scotton ICF and Gil Schwenk EMCC who represent their respective organisations at the Roundtable identified the area of supervision as a potential topic for cooperative working between the professional bodies. Audioconferences between ICF and EMCC progressed this aspiration and an email generated by Claire Palmer on 5 October 2007 confirmed the following key points:

- *"EMCC and ICF are keen to collaborate and work to engage other bodies, define 'coaching supervision' and then look to define competencies (both individual and training programmes)*
- *We will look to invite other professional bodies and interested parties*
- *To that end, coaching supervision will be on the agenda for the next UK Professional Coaching Bodies roundtable scheduled for 16 October 2007. Lise Lewis EMCC will be invited to present the working group with Neil Scotton (ICF) introducing.*
- *In the meantime, Lise Lewis and Claire Palmer will speak and agree how EMCC/ICF can move the project forward."*

The roundtable meeting key agreements from 16 October 2007 includes:
- *"There is an invitation (to all members) to join a supervision working group, or at least be linked up with sharing and learnings.*
- *AC to go back to their supervision working party and see if they wanted to link with this new group, or at least have a representative from this group join in discussions (or vice versa).*
- *Lise Lewis to contact Katherine Tulpa AC to discuss further.*
- *Other bodies to then let EMCC/ICF know if they want to be part of the group or participate in any way ('an intent for action/doing')"*

This project was viewed as being a possible first joint event or initiative where members of the UK coaching roundtable could collaborate for the benefit of the profession.

On 23 October 2007 Lise Lewis circulated an email to all member body representatives for AC, APECS, BACP, CIPD, EMCC and ICF confirming agreement between ICF and EMCC to collaborate with a working title of 'coach supervision' and a starting point of:
"To engage membership organisations and leaders in the Coaching and Mentoring arena in the development of Standards for 'supervision' in coaching and mentoring.'
The first stage objectives for this work are:

- *Define supervision*
- *Define the competencies for 'coach supervision'*
- *Consider alternative 'titles' for the process (*there was recognition that a different word may be more appropriate for the practice in relation to coaching and mentoring)
- *Consider levels of practice in the discipline"*

AC, APECS, BACP, CIPD were invited to join an audioconference on 8 November between ICF and EMCC to discuss progressing this project or to provide feedback on future intention to engage with the project. Follow up calls to all organisations resulted in Benita Treanor agreeing to represent AC and working on the project began on 6 December 2007.

Following a discussion between AC (Benita Treanor) ICF(Claire Palmer) EMCC (Lise Lewis) the following was agreed for circulation to APECS, BACP and CIPD with a further request for expressions of interest to join the project:

"ICF, AC, EMCC have agreed to collaborate on producing standards for 'coach supervision'. We invite you to join us on this project and the following is progress so far in terms of joint agreements:

Our overarching objective is:
To engage membership organisations and leaders in the coaching and mentoring arena in the development of standards for 'supervision' in coaching and mentoring.
The first stage objectives for this work are to:
- *define the meaning of supervision for coaching and mentoring (this focused on starting with the end in mind in terms of what are the expectations of buyers for what coaches/mentors do in relation to 'supervision')*
- *define the competencies for 'coach supervision'*
- *consider alternative 'titles' for the process (we've agreed 'coach supervision' as a working title)*
- *consider levels of practice in the discipline*

Note: the above objectives were not produced following any rigorous process or enquiry rather a first step in starting the discussion. In creating any process or defining a structure, it's recognised there are pros and cons. In the interests of advancing the development of coaching and mentoring supervision, the above objectives were seen as a stepping off point. It is not meant to be a definitive answer other than the first step.

We've also agreed a working model of:
Strategic Steering Group (SSG)
Members of this group represent the leading coaching organisations and are responsible for agreeing the terms of reference as well as coordinating the efforts of stakeholder groups. Membership of the group will be 2 representatives (subsequently agreed as 1 to maintain continuity of discussion) from each organisation. These representatives will not be involved in selling/promoting supervision training programmes, as this expertise is viewed as being best represented within a stakeholder group.

Stakeholder Groups (SG)
These working groups will focus on what to include in the project. Suggestions for these groups are:
- *sellers/promoters of supervision training programmes*
- *other 'experts' working in supervision*
- *coaches and mentors – what do they want in terms of supervision?*
- *buyers – what do they expect of the supervision process they're buying?*

AC, ICF and EMCC agree that each organisation will progress their individual perspectives as relevant. However, we are keen to demonstrate to the marketplace, collaboration between the leading coaching organisations.

We're interested in your feedback on this project and particularly whether you wish to participate. If so, we will update you on arrangements for joint discussion."

Patti Stevens APECS joined the SSG audioconference discussion on 15 April and APECS has been subsequently represented on the project by Jeremy Ridge. CIPD expressed an interest in being updated on the project. Having accepted the invitation to receive the project notes Christina Docchar Project Manager Supervision and CPD for the British Association for Counselling and Psychotherapy (BACP) expressed an interest in being included in the dialogue (November 2008). As this stage of the project was nearing completion we agreed with Christina to hold this offer awaiting interest for taking the project forward.

As well as keeping professional bodies informed on progress, invitations were circulated asking individuals to express their interest in joining one of the stakeholder groups. Membership of these groups is included in the 'Contributors' section of this document.

Once the stakeholder groups were in place the SSG produced 'Briefing notes for the Stakeholder Groups'. This document appears as Appendix A and outlines:
- Membership, purpose and role of the SSG
- Purpose of the stakeholders groups
- Project objectives
- What will happen to the stakeholder responses

Notes of the SSG audioconferences detailing discussions and decisions for supporting the completion of this project appear as Appendix B. These were circulated after each SSG audioconference.

The stakeholder groups are to be congratulated for their significant contribution to this groundbreaking work in the development of the coaching and mentoring industry.

Overview of document

Note: This document is not intended to be a definitive answer to the topic of Coaching and Mentoring 'supervision' rather a living document that will, along with the profession, evolve over time.

Project Background
- Provides an introduction to the Coaching and Mentoring Supervision Project through outlining the motivation for engaging in cooperative working between professional bodies

Document overview
- Describes the content and the structure of the document

Contributors
- Identifies membership of the Strategic Steering Group responsible for project management, collating feedback from the Stakeholder Groups and producing the project document
- Identifies membership of the five Stakeholder Groups responsible for self managing their dialogue and for identifying the detailed content relating to all four project objectives

Outcomes for Objective 1
- Provides main themes on 'defining the meaning and benefits of 'supervision' for coaching and mentoring in relation to stakeholders' perspectives on CPD for a professional coach and mentor' by summarising the outcomes from stakeholders discussions

Outcomes for Objective 2
- Provides main themes on 'alternative titles for the process' in the context of coaching and mentoring

Outcomes for Objective 3
- Provides main themes on 'levels of practice in the discipline' in the context of coaching and mentoring

Outcomes for Objective 4
- Provides main themes on 'defining competences for coach / mentor supervision'

Additional questions
- Highlights questions included in the feedback from Stakeholder Groups on objectives 3 and 4 and which require further work

What next?
- Includes observations relating the outcomes for this project

The full final documents from Stakeholder Group appear in the 'Stakeholder Groups Feedback Final Document.'

Note:
In keeping consistency throughout the project we continue to use our working title 'Coaching and Mentoring' throughout the report. We acknowledge the diversity of different names used within the stakeholder groups and the value they add within the overall discussion

Five stakeholder groups 'met' to answer the above. The groups are:
    Providers of Coach & Mentoring training
    Purchasers
    Independent Supervisors
    Coaches/Mentors
    Ethics

The groups consisted of members of the Association of Coaching (AC), Association of Professional Executive Coaches (APECS), European Mentoring & Coaching Council (EMCC) & International Coaching Federation (ICF).

The responses from the 5 groups have been consolidated by the project's Strategic Steering Group (SSG) which is formed of one representative from each professional body (details below). The full responses from each group are in the Appendices.

The SSG formed in December 2007, with endorsement from each coaching professional body, and has 'met' via conference call once/twice a month for an hour since the project started.

Association of Coaching (AC) – Benita Treanor
Association for Professional Executive Coaching & Supervision (APECS) – Jeremy Ridge
European Mentoring & Coaching Council (EMCC) – Lise Lewis
International Coaching Federation (ICF) – Claire Palmer

Contributors

The following people contributed to producing the outcomes for the four objectives:

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Lisa Wynn

Not representing any professional body: Vassilia Williams

Following are the consolidated outcomes prepared by SSG from the stakeholders groups' feedback:

Objective One; Define the meaning and benefits of 'supervision' for coaching and mentoring in relation to stakeholders' perspectives on CPD for a professional coach and mentor.

Benefits of 'Supervision'

Overall benefits
The overall benefit of 'supervision' is to maximise the potential of coaching and mentoring by enhancing all that is good about the service and working to diminish what is poor about the service.
Feedback on the benefits of 'supervision' can be grouped to take the perspective of stakeholders involved in the practice as follows:

For the coach / mentor:
Continuing personal and professional development:
- encourages and facilitates ongoing learning and development therefore improving practice, working more effectively and ethically with individuals and organisations, with critical moments and impasses.
- creates a learning environment for sharing, and keeping up to date with, best practice
- identification of key coaching strengths as well as blind spots and areas for development
- keeps us honest and courageous by being held accountable to our integrity
- increased self-awareness, competence, confidence, creativity and capability
- maintains consistency and professional standards
- being open to learning in a mutually safe and trusting environment resulting in growth

Reflective practice:
- gaining from another's perspective of their work
- inviting questions that helps the coach reflect on their theories and assumptions in practice
- provides objective feedback on practice and helps coach understand better both the client system and themselves as part of the client-coach/mentor system
- stimulates the opportunity for change and transformation in the coach/mentor
- focuses on the actual practice/work of coach/mentor using experiential learning as the vehicle for collaboratively generated insights.
- can "step back" from practice, look afresh at situations and identify blind spots, deaf spots and dumb spots in their work.
- reflection is used as the main tool of learning where the 'supervisor' facilitates open and honest reflection and the coach/mentor presents and reflects on their work in a transparent manner.
- a place to recognise, discuss and address ethical issues / dilemmas

Support:
- to deal with challenges/difficulties for example when the coach feels "stuck" or the client is "stuck"
- prevents isolation and burnout
- builds confidence and is affirming

- to celebrate good work in coaching and mentoring
- to return to work refreshed and with an extending range of interventions.
- raising awareness of their work on their own wellbeing and development
- support with boundary management

Practice development
- coach/mentor is more marketable (professional approach to maintaining standards of excellence)
- maintaining the 'right to practice' internally as a coach.

For Group & Peer Supervision
- other perspectives
- possible reduced cost
- development of support network

For the 'receiver' of coaching and mentoring:
- offers safety and protection to 'receivers' and ensures, insofar as is possible, that they get the best service possible from their coaching and/or mentoring relationship.
- focus is always on increasing the quality of the service 'receivers' obtain.
- quality improvement of coach/mentoring provision
- more effective coaching
- produces a role model for self-awareness and best practice
- gets as professional a coaching experience as possible

For the providers of coaching and mentoring services:
- assures stakeholders in general and employers of coaches and mentors in particular that their 'deliverers' are working ethically, competently and open to their ongoing learning and development.
- it provides a forum of accountability for quality work.

For the purchasing organisation (that employs the services of coaches and mentors)
- helps them to maximise the potential of their investment (time, money, corporate budget, personal efforts/sacrifice) through accountability, ethical awareness and by helping coaches and mentors to apply their service more profoundly toward organisational goals.
- sustains and develops coaching cultures, and an important source of organization learning
- ensures the needs of the whole client system are met and a ROI through 'deliverers' working with: organisational as well as personal/professional learning and development, transformational change, developing their own quality of service, involving managers in the process arrangements and using both external and internal coaches and mentors
- quality assurance of coach/mentoring provision
- organisational learning as a result of being aware of collective themes emerging
- reassurance that coach is working to ethical guidelines and being reviewed
- assured that its interests are being taken into account

For the coach/mentor growing profession:
- builds credibility of the individual coach/mentor and therefore the profession as a whole

- enhances referral possibilities – many organisations specify that they want to use external coaches/mentors who have supervision.
- 'supervisors' feel responsibility for upholding professional standards and in monitoring ethical and boundary sensitivities (e.g., ensuring that 'deliverers' subscribe to a Code of Ethics, have Indemnity Insurance for their work, maintain professional boundaries etc).
- 'supervisors' see themselves as "gatekeepers" of the profession with a deep awareness of better quality service for individual and organizational clients.

For the wider system
- in supporting coaches and mentors to think more expansively about their work and its contribution to the development of potential and talent and towards better and more effective systems.

For the 'supervisor'
- in their practice with experienced practitioners, internal and external coaches and mentors, in life and organisational settings, can extend their own level of experience and learning.

Meaning of 'Supervision'

There were similarities and cross-over between all the groups around the meaning of 'supervision' for coaching and mentoring. There were also some features or descriptions that also seem to fit benefits.

The definition or meaning which summed up the different groups thoughts around Coaching & Mentoring 'Supervision' was;

'it is a conversational process that helps coaches and mentors to manage their own learning and development in order to improve their ongoing practice'

One of the groups liked the meaning from Bachkirov, Stevens & Willis (2005);
'Coaching supervision is the formal process of professional support, which ensures continuing development of the coach and effectiveness of his/her coaching practices through interactive reflection, interpretative evaluation and sharing of expertise'.

Some of the characteristics of Coaching & Mentoring 'Supervision' were listed as:
- the central focus is on the work
- it's reflective, collaborative and confidential
- based on trust
- accepting of diversity
- the observation of practice
- development of skills and interventions
- practitioner development
- adherence to ethics
- maintenance of standards
- developing competencies
- exploring critical moments in coaching
- both supportive and challenging
- Celebration of good practice

Specific activity within Coaching & Mentoring 'Supervision' would include some of the following;

Clear Contracting – multi-party contracting where appropriate.
Ensuring that standards and ethics are maintained.
Establishing good boundaries
Enhancing reflectivity – working with content and process
Attending to the Coach's Personal Development.
Creating the Working Alliance.
Deepening Coaching Presence.
Building the Internal Supervisor.
Offering new perspectives to the coach.
Increasing the coach's interventions and tools.
Being sensitive to the coach's Learning and Coaching Style.
Teaching about Coaching Psychology.
Working with Parallel Process
Developing systemic thinking
Giving constructive feedback.
Creating experiments through which the coach can learn.
Offering educative and restorative support to the coach.
Working systemically – with coach, client and the wider field.
Opening up new areas of competence for the coach.

There was emphasis on ensuring/maintaining excellent standards within the coaching industry, to developing the coach/mentors' skills and practice and therefore give greater benefit and protection to the client.

Objective Two; Consider alternative 'titles' for the process of 'supervision' ('coaching and mentoring supervision' was a working title)

There was a range of views around alternative titles;

Summary Conclusions about the ' Title ' for the process of Supervision of coaching and mentoring.

A wide range of alternative terms/titles were considered by each of the Groups.

There was no consensus on title or firm decision across the groups although consideration was given to various options within each group.

On balance, it was agreed that it was important that what was involved in the process of supervision needed to be well understood – in particular, through enabling constructive and supportive reflection about coaching and mentoring practice.

Options considered;

Independent Professional Development (and the supervisor as facilitator of this)
Independent Professional Development Supervisor
Mentor Coach Supervisor
Coach Mentor Supervisor
Coach Mentor Reflective Supervisor
Reflective practice supervisor
Consultative support
Senior reflective consultation
Facilitated reflective practice
Mentoring
Coaching
Meta coaching
Supervision

Suggestions put forward;

- Coach Mentor Supervision
- Professional Coaching Supervision
- Mentoring
- Coach Mentoring

What is clear is that it's important that what is involved in the process of 'supervision' needed to be well understood. It is also recognised that the title 'supervision' may be difficult to drop completely.

Objective Three; Consider levels of practise for 'Supervision' for Coaching and Mentoring.

The majority view from the stakeholder groups is that it was hard to distinguish the levels of practise for 'supervision'. The supervisor stakeholder group classified in 3 categories – practitioner (newly qualified) advanced (experienced and confident) and mastery (highly experienced). This highlighted the maturing process in developing the experience as a supervisor.

- Additional comments relating to competence/experience for a 'supervisor' included:
  Experience:
  - o minimum requirements – hours of coaching experience etc
  - o come from related fields and other fields eg psychotherapy
  - o be at the same level as the coach
  - o belong to a professional body

  'Supervision' training:
  - o entry requirements to training
  - o engage in assessed training/ become qualified
  - o have agreed entry criteria to training eg 3 years experience

  CPD:
  - o has own supervisor

Objective Four; Define the competencies for 'Supervision' for Coaching and Mentoring.

Summary
The groups assume that a coach/mentor supervisor would

- Be a qualified/accredited Coach
- Be additionally qualified in Coach/mentor Supervision
- have a minimum number of hours and years coaching experience (varied from 0 to 3 yrs) and be able to demonstrate the competencies of a qualified coach

The groups drew their feedback from a variety of sources and backgrounds. Some of the groups built the suggested supervisory competencies from current coach competencies. They also made reference to Hawkins & Smith 'Coaching, Mentoring and Organisational consulting', Peter Bluckert's work as well as their own experience and knowledge.

The Providers group also looked at Coach supervision training and the steps towards qualification as a coach/mentor supervisor. The ethics group thought that training should be coach specific in order to aid assurance of ethical codes and include psychological dimensions; new coaches would need an experienced supervisor. They went on to pay attention to ethical principles and these have been combined with the *Facilitating Effective Ethical Awareness* competency below whilst the guiding principles from the group are in the Stakeholder Group Feedback Final Document Part TWO

The SSG has consolidated the competencies from the groups. We believe the commonality has been captured below whilst recognising that the detail in the Stakeholder Group Feedback Final Document Part TWO provides more depth for future work. Coach/mentor supervision skills around coaching are assumed.

The competencies proposed are:

Setting up and Contracting the Supervisory relationship or Establishing a supervision contract/agreement

a) To establish a clear contract for the supervisory relationship considering the boundary of confidentiality and its variation in a supervisory relationship with respect to the supervisor's responsibility to ensure ethical practice

b) Identifying the learning needs of the supervisee

c) To negotiate a working agreement with supervisee/s including the coach's responsibilities and what is appropriate in the supervision relationship and what is not

d) To establish 3-way, 4-way and group contracts where relevant

e) Agreeing and planning the flow of the supervisory session and providing the structure to enable the supervisee to work effectively

f) To establish appropriate criteria for supervisee and supervision evaluation and set up opportunities to engage in evaluation

g) Ability to explain what supervision is and how it differs from coaching and mentoring

Managing and Maintaining the Supervisory Process

a) Monitors and reviews with the supervisee, the relationship between the supervisor and supervisee to ensure there is an effective working alliance

b) Ensuring that the expectations of the client and the sponsor (where applicable) are understood and agreed

c) Monitoring the supervisory process and shifting blocks where possible in the learning or the supervisory relationship

d) Review and renegotiate the working contract when required

e) Awareness of the developmental stages through which supervisees and supervisors travel and being able to match supervisory interventions to supervisee levels of development

f) To encourage supervisee confidence through active support and encouragement

g) To recommend further interventions for the supervisee if needed (e.g. training, counselling etc)

h) Give constructive feedback to facilitate supervisee learning

i) To deal with issues of transference in the supervisory relationship

j) Write reports when required (for training or other institutions as agreed in contracting with supervisee)

Facilitating Learning to ensure enhanced efficacy in coaching/mentoring practice

a) Facilitating experiential learning to support the supervisee to develop
    i. Insight and awareness – help supervisees discover how their thoughts, beliefs, perceptions, emotions etc impact n their coaching practice
    ii. Reflective skills
    iii. Self coaching / learning to learn skills
    iv. Giving and Receiving feedback skills
    v. Realistic self assessment
    vi. Emotional Intelligence

b) Creation of a safe reflective space

c) Ability to make assessments of what competence level the supervisee is working from in protection of their clients

d) Encourages creativity, experimentation

e) Challenges appropriately

f) Introduces news learning models, frameworks, ideas and tools where appropriate for supervisee to consider
g) Give feedback:
    a. ability to observe and give feedback with fearless compassion and to give feedback in the 'here and now'
    b. to listen to a piece of work and evaluate it against agreed criteria if requested.
h) Demonstrate advanced communication skills:
    a. willingness to change the supervisee and help him/her/them work outside their comfort zone by creating a safe environment
    b. ability to ask powerful questions that evoke discovery, insight, commitment or action
    c. listening to what is being said as well as what is not being said.
i) Being able to work with a multi/meta perspective and take a helicopter view
j) Create a 'shift in the room' in helping the supervisee to practice what they are going to say/do as part of the supervision session including providing immediate support and challenge and encouraging the supervisee to be accountable and to take action.

Facilitating Effective Ethical Awareness and sensitivity including boundary management to ensure effective and ethical coaching/mentoring practice

a) Supporting supervisee to explore ethical challenges, boundaries between their work and other professions/disciplines and make ethical decisions
b) Operates within the limits of his/her own competence and referring the supervisee on to another professional if his/her competence has the potential to be exceeded.
c) Build capacity in the supervisee to reflect on their ethical stance to support their ability to consider ethical dilemmas in the moment during coaching and act appropriately
d) To encourage supervisees to be part of a professional body, have indemnity insurance, participate in regular CPD and subscribe to an ethical code
e) Ensure quality control and ensure high standards are maintained in the coaching profession
f) To increase awareness in the supervisee of the congruence between their actions and their articulated professional practice
g) To support the supervisee to consider systemic/contextual/organisational issues and the impact of these issues on their work and themselves
h) To intervene appropriately where ethical issues (eg harm to anyone, misrepresentation) are at stake (who to contact, when to contact etc)
i) Awareness of own culture, gender, sexual orientation, background, assumptions, values, beliefs, mindsets, experiences and prejudices and others areas of individual difference and to support supervisees to consider how these may impact on their work and themselves.
j) Awareness of the legal and moral responsibilities of a supervisor

Characteristic Behaviours required to effectively perform the above activities

- Models respect, acceptance of difference, openness and curiosity about own internal responses and towards supervisee about what might be happening in the supervisor/supervisee/coachee relationships.
- Builds trust whilst also creating a challenging and developmental learning environment
- Ability to manage the power and authority role in a responsible non discriminatory manner
- Builds trust whilst also creating a challenging and developmental learning environment
- Comfortable in establishing and maintaining effective boundaries within the supervisory relationship
- Open to feedback including what is and is not helpful in the supervision relationship and acts on feedback where appropriate
- Open to 'not knowing', to taking risks and to be open to getting it wrong as well as getting it right
- Open to experimentation with new possibilities for own action
- Demonstrates a commitment to Supervision and CPD of their own practice
- Actively reflects on the impact of their values, knowledge, experience and assumptions on themselves as coach/mentor and as supervisor
- Confidence in working with strong emotions, ability to self-manage and not be overpowered or enmeshed by supervisee's emotions and to offer emotional support.
- The capacity to manage and contain anxiety
- Evidence of Reflective Practise
- Ability to recognise and work with parallel process, to notice blind spots and behaviour patterns in self and supervisee(s) and to use these observation s to enhance the supervisee(s)' coaching practice.
- Ability to work with intuition and 'gut feel'

Work effectively with groups for group supervisors
- competence in handling group dynamics and ability to facilitate the group's development through awareness of the stages that the supervision group may go through
- willingness to notice and name what is happening in the group and explore how that might be impacting on the supervision process, group members and other stakeholders
- For group supervision to be aware of group process and when and how to intervene appropriately
- understanding of group dynamics

The knowledge base (beyond that of a coach/mentor);
- multiple theories/models of supervision
- Systems Theory (e.g. organisation, family etc)
- Models of coaching and mentoring
- Learning theory and its application to supervision
- Human Behaviour - psychology
- Legal frameworks for the field
- Ethical Principles
- Understanding of how change takes place in self and others

Guiding Ethical Principles for Coach Supervision

These principles refer to all the stakeholder relationships impacting on the coach supervision process including:

- Coach Supervisor – supervisee
- Coach Supervisor – professional body / coaching profession
- Coach – coachee
- Coach – client / organisation
- Coach – professional body / coaching profession / the public at large

a. Do no harm
b. Ensure your client is best served
c. Transparency
d. Professionalism
e. Justice
f. Autonomy

Some questions raised around Objectives 3 & 4 (levels of practise and competencies) requiring further work.

A great deal of excellent material has been produced by the various Stakeholder Groups during this Supervision Project.

Equally, the Groups have typically been open and honest about some of the continuing questions needing further work.

Many of the continuing questions refer to the need to clarify the broader context for Coaching/Mentoring Supervision.

Comments are included, here, from each of the Groups, to provide a summary / key perspective on these needs for continued work,

Providers of coaching and mentoring supervision training:

……… the need to choose supervisors that connected to … level of experience and connected also to the contexts in which they work….. it may be necessary for coaches and mentors to choose supervisors more knowledgeable in certain areas e.g., specific contexts like organisational work, specific groups of coaches (life or executive), trainees, internal/external specialists, managers as coaches and mentors.

We discussed but reached no final agreement on whether or not individual and group supervision should be treated separately. It may also be necessary for coach/mentor supervisors to supplement their basic training with further skills (e.g. in small group facilitation, team facilitation etc).

These accreditation schemes will have to decide whether or not they give blanket accreditation or specify it e.g., supervisors or individuals, of groups, of specific contexts.

And on how to define Accreditation …..

" …. the curriculum of what we would expect such a course to contain … what would be covered in the course (e.g., what is coaching/mentoring supervision in the context of a multi-disciplinary profession, models of supervision appropriate to multi-disciplinary coaching/mentoring, contracting, ethical and legal issues, boundaries, dealing with ethical dilemmas, ethical decision making, learning and personality style's, individuals and group supervision, peer supervision, organisational aspects of supervision etc).

Should the course be assessed and if so, how …….. "

Purchasers of coaching and mentoring services including supervision training

" There should be an agreed entry criteria for the training which combined with agreed requirements for Coach Supervision Training qualifies an individual to be a "Coach Supervisor/Mentor". Formal qualification is sufficient. "
But then added …

" Challenge to initial assumptions:
…… Not necessarily a coach to be a supervisor – could be from a psychology background (eg: BACP registered supervisor)   "

Independent supervisors:

Also emphasised the questions to be addressed in the broader context of Coach/Mentor Supervision:

" Supervision is a broad and the supervisor's role is to hold the seen (supervisee) and the unseen (their client base). The supervisor is responsible not only to the supervisee but to assess the supervisee's competency, capability, and capacity to fulfil their particular client, work or organisational requirements.

In particular:

Ability to make assessments to benefit the growth and maturity of supervisee, for the protection of their clients, and stability of their practise.

Ability to manage the power and authority of the role in a responsible non discriminatory manner."

Etc

Ethics

" ……….. It was felt that objectives 3 and 4 had been dealt with sufficiently for this group and that they would be addressed in more detail by the other sub groups ….

The group felt it more important to formulate an ethical statement for CMSs

Time was therefore focussed on developing some clear guiding ethical principles.

The Ethics Group also considered the wider context considering impact of the broader stakeholder relationships the Coach Mentor Supervisor's, viz …..

Coach Supervisor – supervisee
Coach Supervisor – professional body / coaching profession
Coach – coachee
Coach – client / organisation
Coach – professional body / coaching profession / the public at large

The aim is not to develop a complaints procedure but to explain what is good practice, what is not and what key ethical principles underpin this ……."

Coaches/mentors

Also raised a number of questions - particularly around the subject of levels:

"   The group had mixed views: Some felt a coaching accreditation or qualification was essential and the qualification should be a recognised by accrediting bodies. Whilst some experience also indicates that good supervisors may come from related fields without Coaching quals (Psychotherapy). Supervision experience is important along with an understanding of coaching context, organisational context (where relevant) and coaching competencies.

At this stage of the development of the industry, it may not yet be clear what would constitute an appropriate qualification ……. "

Next Steps and Recommendations for taking the dialogue forward

The role of the SSG at the end of this project was to collate stakeholder group findings, extract main themes, make recommendations to our individual organisations, the Professional Coaching Bodies Roundtable and to provide feedback to stakeholder groups.

The 'main themes' approach to the project document was identified to reflect feedback from the stakeholder groups in a way which retains the essence of their discussion and in their language. At this stage, therefore, any final results from this work are still to be identified and there is an opportunity to develop further the work. Our recommendations for this include:

- **a continuation of this project with revised objectives by:**
  - o **existing participants in stakeholder groups or similar structure which enables those who wish to remain involved to continue and attracts others who would like to become involved**
  - o **confirmation from professional bodies to continue to be represented as contributors to a strategic steering group or similar in a project management role.**
- **individual professional bodies develop the work for their own purposes**
- **a research study aligned with a professional body, university etc**
- **developing the work through the Global Coaching Community dialogue etc.**
- **with agreement and participation from stakeholder groups and the professional coaching bodies to produce a 'conclusions' paper for publication.**

In preparation for this 'next steps' stage, the SSG following discussion on 1 October 2008 invited wider feedback on comments and thoughts on 'what to do next' with the project outcomes. Those on the distribution list were asked:

- Where could we publish and promote the findings?
- What other organisations could be included in the distribution list?
- What else would the individual organisations, the roundtable and the stakeholders like to have happen?
- How can we make a difference to the coaching and mentoring industry through the outcomes from this project?

Here are the responses:
- 'We all know that the core of supervision is mutual learning. Learning in this sense means creating new knowledge for the individual coach mentor and supervisor. What sort of new knowledge? Isn't it patterns of relationship in a working or private context? What are the patterns that emerge when presenting, supervising, discussing the cases of supervisees? From the perspective of the observer of second degree it's relationship and behaviour, it's situational, it's incidental, it's "momental", it shows up expectedly or as surprise.'
  Up to today there is almost no research available on supervision would it be reasonable to define some key research questions and to design a research network consisting of practitioners i.e. coach mentors and supervisors participating with their cases in a defined format on the one hand and representatives of the academia on the other? We may expect that the "difference to the coaching and mentoring industry" will soon

become evident. There can be local, regional, national networks in every EMCC affiliate country. Networking participants could be professional coaching bodies (as you mention below). This project would become the first cooperative joint effort across EMCC, ICF, etc. Certainly it will bring about unifying effects in the coaching and mentoring industry. Wouldn't this make a difference that makes the difference? (Talcott Parsons?).

- Wider consultation of the findings with the coaching profession – perhaps even a conference with workgroups to consider each aspect?
Individual membership organisations to put out a statement of intent (each organisation might have a different direction of travel)
Perhaps ENTO involvement?

- On the question of what happens now I have a few more ideas:-
 - publish an edited version of the key findings in the ICF newsletter for members
- share the findings with the Global Coaching Community group (who met in Dublin?) who are planning to be discussing very similar territory
- share findings & recommendations with appropriate committees within the ICF and draw up a schedule for action on key points

  The purpose as I understand it is to strengthen the similarities and concerns expressed with a view to engendering future debate, which in turn will build a stronger, emerging profession. It would be a great shame if nothing came from all the effort expended. Got to keep moving now.......!!

  Adopting a way forward that allows the best of the profession to emerge is worth fighting for.

- While supporting the sense of the document, continue to believe strongly that the use of terms "supervision" and "supervisee" is a huge mistake and that there are better terms to be adopted. The implications of this term worldwide are too diffuse and have connotations that I believe the coaching profession does not match. Also, I avoid the term "coachee" and feel that "individual and corporate clients" are the more appropriate terms. I'd like to register this apparently minority opinion at this time and urge the larger group to consider other terminology.

- A quick response to your one of your questions. I was wondering if having gathered all this interesting information whether a small representative group could gather it into a short booklet with the four/five areas and summarise in a creative way where we are vis a vis these areas of supervision of coaches and mentors. I know we had some rick discussions and our conclusions could easily be merged with others for an enriching contribution to the ongoing progress of supervising coaches.

- As a bare minimum I think we could promote this work and publicize in Coaching World. I think it would also be an excellent beginning of a broader conversation with ICF (and not only perhaps) coaches world-wide. We could present findings of the group to them and ask for their reaction (from the experience, culture, geography and many other aspects) stand point.

- Hopefully then we can agree on ICF-wide understanding of what "supervision" (or whatever we call it) is and should other organizations wanted to adapt a similar process

of consulting with their broader membership, perhaps we can arrive at common definition of supervision and standards for it.

We continue in our role as SSG to:

- **circulate this document to professional bodies, stakeholder groups and roundtable membership on 24 December 2008.**

- **provide a transition stage awaiting decisions on next steps.**

- **receive collective/individual member feedback from the roundtable professional coaching bodies on the contents of this next steps section.**

- **communicate feedback from the professional bodies roundtable and individual professional bodies to the stakeholder groups'.**

Appendix A – Original Stakeholder Briefing Notes

The Strategic Steering Group for the Coaching and Mentoring Supervision Project

Who are we? Representatives from:

 AC Benita Treanor – ICF Claire Palmer – EMCC Lise Lewis

We formed in December 2007 with endorsement from our organisations and are delighted that you have offered to invest your time in this project. We meet via conference call once/twice a month for an hour

Our purpose is to:

Create a platform for discussion with representatives from coaching and mentoring organisations to enable discussion to take place on the activity of 'supervision' and what this practice is in relation to coaching and mentoring.

Create Stakeholder groups in these five areas:

1. Providers of coach/ mentor supervision training
2. Purchasers of coach/mentor supervision training and services
3. Supervisors
4. Coaches/mentors
5. Ethics

We offer to:

Maintain our objectivity and encourage the stakeholder groups to develop outcomes that benefit the profession

Provide guidance to stakeholder groups as and when required

Be guardians of the process in pulling the outputs together in collaboration and to make recommendations to our individual organisations.

Via our organisations, make recommendations to the UK Professional Coaching Bodies Roundtable

Purpose of stakeholder groups

Terms of reference:
• **To make recommendations which support standards and ethics in 'coaching and mentoring supervision'**

• **Activities of stakeholder groups**
Once stakeholder groups/ membership are identified, each group will self manage their activities to achieve the project outcomes. We've randomly highlighted on person in each section to initiate contact within the group however anyone else in the group can also start things moving.

The suggestion is that the groups 'meet' via Skype or a teleconference bridge line (contact one of the SSG if you need one).

Strategic Steering Group would like you to:
• provide SSG an update from each group with feedback on stakeholder group activity by the end of April 2008
• produce outcomes for PO 1 and 2 (outlined below) by 31 May 2008
• provide end of monthly updates to SSG on progress
• produce outcomes for PO 3 and 4 (outlined below) by 30 Sept 2008

The rationale for these deadlines is to provide capacity for collation and collaborative agreements on work produced for the marketplace.

We value your investment of time to the coaching community – particularly as no expenses are available for this project.

Project objectives:
First Stage:
1. define the meaning and benefits of 'supervision' for coaching and mentoring in relation to stakeholders' perspectives on CPD for a professional coach and mentor.
2. consider alternative 'titles' for the process (we've agreed 'coaching and mentoring supervision' as a working title)

Proposed completion by 31 May 2008 with an Output document covering your stakeholder group findings for objectives 1 & 2
Second Stage
3.consider levels of practice in the discipline
4.define the competences for coach / mentor supervision

Proposed completion by 30 September 2008 with an Output document covering your stakeholder group findings for objectives 3 & 4
What will happen with your responses?

The SSG will collate your findings, extract main themes, make recommendations to our individual organisations, the Professional Coaching Bodies Roundtable and feedback to stakeholder groups.

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