

***RESEARCH POLICY
AND PRACTICE
PROVOCATIONS REPORT
SERIES***

***Coaching and ethics in practice:
dilemmas, navigations,
and the (un)spoken***

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Introduction to the series and our approach

The European Mentoring and Coaching Council (EMCC), with its vision to be the 'go to' body for coaching and mentoring across the globe, considers research to be a cornerstone of its strategy to spur the enhancement of practice, to spur innovation, and to drive the highest standards in professionalisation.

Working towards this aim, the EMCC has spearheaded the '**Bridging the Gap**' agenda. This comes to life through a number of activities including the *International Journal for Mentoring and Coaching*, various *Work Groups* across Europe, and expanding the *International Mentoring and Coaching Research Conference*. This year's conference in London, **putting research at the heart of practice**, is closely aligned to this report.

Making even bigger strides in the 'Bridging the Gap' agenda requires effort and energy from practitioners and researchers alike - success is dependent on alternative ways of thinking and acting. This is a shared endeavour. Such a transformation needs a genuine **cooperative curiosity**, where we find ways to listen, reflect, and experiment together. This is a stretch goal, but one with significant rewards for all those involved.

It is against this backdrop that we set the aspiration for the new *Research Policy & Practice Provocations* reports. Each one shares a common aim - to create a series of interactions, which spark new thoughts, emotions, and actions over time. For some, those sparks may emanate from the presentation of research findings and ideas within this report, and for others, sparks will spring from face-to-face discussions in an event (such as an EMCC conference) or an online post on our LinkedIn Group.

The *Research Policy & Practice Provocations* reports offer a forum to engage in **cooperative curiosity** and to question some of the underlying assumptions our profession may hold about itself and about coaching and mentoring research. We hope you find some new energy, sparks, creative insight and connectivity by engaging with this new series. We extend a warm welcome to another opportunity to co-create our future profession.

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01 Overview of the report

This *Research Policy & Practice Provocations Report* is the third in a series which aims to influence how we think about and how we conduct coaching and mentoring research and development.

Ethics and ethical practice can be understood as fundamentally important to being human (Wall et al 2016). Indeed, it has been found to be an area which is especially important to the high impact world of the coach and mentor (Wall et al 2017a) with the publication of the Global Code of Ethics (a joint venture between the Association for Coaching and the European Mentoring & Coaching Council).

Although challenging, developing and polishing the ethical compass as part of the professional development of coaching and mentoring practice is a rewarding process for the coach. This report brings you an opportunity to refresh your thinking and practice in relation to ethics and ethical issues, and offers expert perspectives towards illustrative challenges.

This report shares:

1. An overview of ethical foundations in coaching
2. An overview of survey research exploring coaching ethics in practice (conducted in 2017), along with expert reflections and suggestions
3. Prompts to explore the ethical we may not be considering in practice and why
4. Reflections on how coaches/mentors might navigate ethical tensions
5. Ideas and reflections on promising practices which promote ethical responses in coaching and mentoring practice.

02 Ethical foundations

This section considers the foundational issues that coaches and mentors need to consider. When it comes to establishing and maintaining an effective coaching relationship with clients, several ethical issues need to be taken into consideration. Here, we explore some of the foundational considerations: confidentiality; conflict of interest; the tripartite relationship, self-management; and supervision (Iordanou et al., 2017).

Confidentiality

Confidentiality is the pillar of any healthy relationship, both personal and professional. It is the cornerstone of the 'helping' professions and, in consequence, particularly pertinent in coaching (Iordanou et al., 2017). Confidentiality entails respecting the client's right to secrecy and privacy, by making an active commitment to not disclose the client's private information. While, in theory, this is a good maxim to follow, in practice things are not always as straightforward as they may sound.

Consider, for example, a scenario where a coachee reveals to her coach that she is planning to harm herself or that she has been involved in criminal activities. Is it ethical for the coach to intervene and report her or not? Confidentiality therefore, has limitations, since there might be compelling reasons for disclosure. The most widely accepted amongst those are outlined in the box on the right (adapted from Iordanou et al., 2017, p. 55).

Informed consent: This is where the client grants permission to disclose specific information to specific people or organisations for specific purposes. The best way to overcome any potential ethical pitfalls in this scenario is to seek the client's consent and make a record of it. This record should include the conditions set by the client as to what may be disclosed and to whom. If disclosure has been made, it is ethically (and legally) good practice to keep a record of what was disclosed, to whom, and when.

Moral obligation: In the helping professions the practitioner is required 'to balance the public interest between the public good served by preserving confidentiality and the public good served by breaching confidentiality' (Bond, 2015: 174-175). Accordingly, the coach has a moral obligation to protect the client and other members of the public from physical harm. This may lead to breach of confidentiality. There are no rigid criteria that determine when a coach is morally obliged to override confidentiality but issues such as the degree of risk, the seriousness of the harm, the imminence of the harm, and the effectiveness of the breach of confidentiality can be considered (Bond and Mitchels, 2015). If the moral obligation to disclose confidential information arises, the disclosure should be made on a strictly confidential basis to a person or organisation capable of preventing the harm and it should be restricted to that information that will help prevent the harm.

Legal obligation: A coach has a legal obligation to disclose confidential information that will help detect and prevent serious crime. According to the NHS Code of Practice, serious crime includes murder, manslaughter, rape, treason, kidnapping, child abuse, and any other case where individuals have suffered or may suffer serious harm (Department of Health, 2003: 35).

Conflict of interest

Conflict of interest arises in situations where an individual has competing interests, and it is quite common in the sphere of business. For example, can a line manager be the coach for an individual who directly reports to them? Several parameters need to be considered in this scenario. These include understanding the purpose of coaching, the line-manager's responsibility to the potential coachee and the organisation, and the support both parties can receive in the process, amongst others.

Managerial coaching, as this approach has been termed, has been deemed a positive developmental approach, because instead of giving orders or micro-managing, a manager can deploy coaching in order to facilitate the employee's own reflection of how they can improve their performance (Ellinger et al., 2014). However, according to a recent CIPD report, "the psychological boundary issues for line managers formally 'coaching' their own staff are very difficult to manage" and, in fact, "the roles and responsibilities of line management make formally 'coaching' your own staff very difficult" (Knights, 2008: 7).

Should a coach decide to embark on this process, potential impediments, including the manager's lack of training, skills, and time, as well as both the manager's and the potential coachee's willingness to embark on the process, need to be taken into consideration.

The Tripartite Relationship

Within business contexts, the coaching relationship usually involves a triad: the coach, the employee to be coached, and the organisation or individual that commissions and sponsors the coaching. If the coaching is paid for by the organisation, this begs the following question: who is the coach's client, the coachee or the paying organisation?

Conflicting views have been postulated on this matter. Coaching scholars and practitioners have argued that the client is the coachee and the coach's role is to help the coachee develop within the organisational context, while clearly delineating the boundaries between the coach, the client, and the sponsoring organisation (see, for example, Thomson, 2014, pp. 51-52; van Nieuwerburgh, 2015, p. 4; Iordanou et al., 2017, pp. 126-128). Other voices, especially from the sphere of counselling and psychotherapy, claim that the paying organisation is the client because the contract is between the organisation and the coach (Peltier, 2010).

Practising ethically means that all parties involved in the tripartite relationship – the coach, the client, and the sponsor – have a mutual and clear understanding of the expectations of coaching and the responsibilities of each within this process. If the sponsor has a specific agenda for the coaching, for example, this should be clearly communicated to the coaching client, so that there is clarity and transparency as to what the purpose and the objectives of the coaching should be.

Self-management

The job and career progression of the coach rely heavily on extensive networking and, by proxy, growing connections that can help expand one's professional outreach, in order to increase one's connections and business. In consequence, it is not inconceivable that a coach may have prior knowledge of an individual they are asked to coach, either by the individual's reputation or through the individual's colleagues, that the coach may have coached in the past.

This is even more probable if the coach is internal to the organisation. As forming personal opinions is an inherent part of human nature, the coach needs to be aware of potential bias or prejudice that may arise and potentially interfere with the coaching process. He/she should thus exercise self-management, that is, the process of “recognising bias, preconceived ideas, initial impressions, opinions or stereotypes that can influence the ability to be fully focused and present with the client” (Brennan and Wildflower, 2014, p. 437).

Accordingly, we encourage coaches to consider possible ways in which they can manage themselves, if they recognise any natural instances of bias in their work with clients. Notably, it is important to reflect on the possibility that personal biases influence the coaching relationship to the point that the latter cannot lead to the expected developmental outcomes.

Continuing professional development (CPD)

Coaches have an ethical obligation to themselves, their clients, and the coaching profession to uphold professional standards in order to practise safely, effectively, and legally. This is why CPD is one of the foundations of an ethical coaching practice (Clutterbuck, 2017). CPD in coaching may involve reading the latest empirical development in the field; attending and participating in conferences, workshops, seminars, and scientific meetings related to coaching; supporting and even participating in coaching-related research; attending peer-coaching or peer-mentoring meetings; pursuing further qualifications and training; and, of course, actively pursuing regular supervision, as a supervisee and, if possible, as a supervisor.

Supervision

Since coaching is primarily a helping service, coaches need to have and maintain the competence, effectiveness, and resilience to help clients achieve their set goals. This, of course, is a worthwhile pursuit that may, however, become emotionally onerous, both for the coach and the client. As a result, considerable stress and even emotional burnout can potentially ensue. It is the coach’s ethical responsibility to monitor his/her responses to coaching sessions and to protect his/her own wellbeing in the process. In consequence, regular supervision that can help anticipate and manage any issues that emerge from the coach’s practice is paramount.

Supervision is “the process by which a coach with the help of a supervisor can attend to understanding better both the client system and themselves as part of the client-coach system, and, by so doing, transform their work and develop their craft” (Hawkins and Smith, 2006, p. 12). Despite its cruciality for an effective coaching practice, supervision is still not mandatory in coaching, as it is in other helping professions, such as counselling and psychotherapy.

Yet, all professional coaching bodies advocate the importance of regular and ongoing supervision, as a platform for on-going reflection on the coaching practice and the coaching relationship (Iordanou et al., 2017). Considering the complexity of the coach’s work, which involves working through individual, interpersonal, and organisational issues, regular supervision has the potential of supporting the well-being of the coach which, in consequence, can benefit and safeguard the coachee.

03 Research approach and methods

This report explores the experiences of coaches and mentors in relation to ethics and ethical practices, with a view to generating provocative insights for practice (Stokes and Wall 2014). Towards this broader aim, the stages of the approach and method included:

- An exposition of the foundational ethics and ethical considerations in the context of coaching and mentoring practice – to inform the scope and design of the survey.
- A survey which covered aspects such as coach / mentor characteristics (primarily focusing on discrete data) and posed critical incidents (primarily focusing on open ended data).
- A series of expert reviews and responses to the data: (1) two members of the EMCC global ethics working group and an independent researcher analysing and commenting on the data, (2) an expert examining areas which are not present in order to raise awareness of wider systemic ethical considerations, and (3) experts developing possible practical responses in relation to ethical dilemmas.

The broad research questions for the study were (1) What are the characteristics of coaches / mentors in relation to ethical considerations?, and (2) How do coaches / mentors predict they would respond in relation to ethical dilemmas? This broadly reflected the two sections of the survey: part 1 focused on the collation of discrete data about coach / mentor characteristics, followed by part 2 which focused on open ended data about how coaches / mentors would respond to ethical dilemmas.

The survey articulated a number of critical incidents which were fictitious but based on the foundational ideas in ethics. The dilemmas were considered by the research team to be typical within the context of coaching and mentoring, but not necessarily representative of all of the types of ethical challenges that coaches and mentors face. Coaches and mentors were then invited through EMCC and other professional networks. All responses were and continue to be unidentifiable (Economic and Social Research Council, 2015).

Data analysis primarily focused on frequency analysis for parts 1 and 2, which was then reported to the experts group and the wider research team involved in this publication for further analysis, reflection and comment. Additional analyses were undertaken for content omissions as informed by wider global challenges (Wall 2018).

Though bounded by the sample size of this report, and the restrictive nature of survey based qualitative responses, this research could be fruitfully extended by engaging a larger number of less experienced coaches/mentors, and a wider cross section of cultural contexts (Wall et al, 2016).

04 Survey results: how did we respond to the dilemmas?

The survey was conducted in the last three months of 2017, and 227 responses were generated. Most of the respondents replied to the ethical dilemmas (180), and reported 10 or more years of coaching experience (206). The results were analysed by three authors of this report (Cumberland, Lerotic Pavlik, and Csigás) in the first three months of 2018.

In relation to part 1 of the data, an executive summary, and detailed data are presented in the Appendix of this document.

This section, however, focuses on part 2 of the survey, that is, the ethical dilemmas which coaches responded to as part of the survey.

This section presents:

- The ethical dilemmas themselves, presented in the format of short, to the point, critical incidents, and questions.
- A summary of the answers given by those coaches and mentors who completed the survey. These summaries reflect the main patterns and themes in the answers.
- Expert recommendations from the EMCC International Ethics Workgroup regarding each dilemma.
- Reflections on the patterns and themes: these focus on what the patterns and themes mean for the profession in a broad sense and for the EMCC in particular (we are aware that the respondents do not represent the whole EMCC community or the profession).

How to get the most out of this section?

You may decide to follow the steps below in engaging with the material presented in this section. These steps can support you in raising your awareness regarding ethics and may lead you to uncover other dilemmas and challenges from your own practice.

1. **Read the dilemmas and consider your practice:** have you ever faced such a situation, or a similar one? If yes, what was your reaction? What did you do? What would you do now? If you had such cases previously, then what has changed in your approach? What has brought about this change in your approach?
2. **Read the summary, and consider your position against the opinion of your peers:** Are you in line with their thinking? Are there any points in which you would raise a debate?
3. **Read the expert commentary and consider these points:** What could you incorporate from these into your current practice? What might you challenge?
4. **Read the reflections part, and engage in reflection as well:** What could you do to enhance your own practice?

Dilemma 1

A father engages you to life/career coach his teenage daughter. He asks you to let him know if you find out if she is having a sexual relationship with her boyfriend or is taking drugs. What issues does this raise for you?

Summary of comments:

- No respondents said they would agree to the father's request.
- Over 90% say that the concepts of confidentiality, privacy, consent and boundaries apply. As a result, respondents said that would either (1) undertake the coaching engagement and would not tell the father anything that should remain within the coach-coachee relationship, or (2) would not accept this coaching opportunity. Respondents said they would reject this work on the grounds of it being an unethical, an area of practice not covered by the coach, or that the coachee may be too young.
- A number say that would refer the father to the Global Code of Ethics. They would explore or educate the father on what is appropriate to ask of a coach. Some said they would explore/work on the father's issues rather than coach the daughter. Others questioned whether the father was considered the sponsor in this case.
- A very small number suggested that they may reveal information if the law was being broken by taking drugs.

Experts' opinions and suggestions:

Assuming that the coach is suitably qualified to provide such life coaching, they should consider the following questions in deciding how to proceed:

- What is the father's reason for asking this? Is the daughter aware of his wish to be informed? It makes a major difference if the father (being the sponsor) states and explains this wish in the presence of the daughter and not secretly behind her back. Explaining and educating the father about the Global Code of Ethics in the presence of the daughter benefits their future relationship.
- Except for the situation where the daughter is (for whatever reason) to be considered

'vulnerable', the situation is not very different from when the employer is the sponsor and wants to be informed about the employee's progress in coaching. How many coaches would turn that work down?

- What is the appropriate level of confidentiality that needs to be maintained? The coach can reflect upon section 2.13 of the Global Code of Ethics: "If the client is a child or vulnerable adult, members will make arrangements with the client's sponsors or guardian to ensure a level of confidentiality in the best interests of that person while working within current legislation." Is there a legal reason to break the confidentiality between coach and client in this scenario?
- Is it appropriate to coach the client and before doing so to have an agreed level of confidentiality? This is covered in section 2.11 of the Global Code of Ethics: "Members will have a clear agreement with clients and sponsors about the conditions under which confidentiality will not be maintained (e.g. illegal activity, danger to self or others etc) and gain agreement to that limit of confidentiality where possible."

Reflecting on the responses:

- It is positive that no respondent would simply agree to the father's requests. This demonstrates a good universal ethical foundation among respondents. How might we raise and extend this to cover fuzziest, 'grey area' dilemmas?
- **The topic does raise the challenge of laws being broken – how many of us have ever experienced this? It seems to be time to seek real-life examples of ethical dilemmas from our community to learn, and to reflect on. Ethical challenges could be another topic, around which professional conversations should take place.**

Dilemma 2

You have had a stressful few months and the stress is impacting on you e.g. you are not sleeping well. As a result your concentration and positive energy is low during your work. What issues does this raise for you?

Summary of comments:

- All respondents recognised the potential negative impacts. Over 25% of respondents raise 'ability to perform', citing potential lack of focus, concentration, decision making ability, positive energy, rapport and/or being present.
- Respondents also mentioned the wider impact on client's well-being and state of mind, and in the longer term, on own reputation and that of the profession.
- Burnout as a long term effect was also mentioned: there was a recognition that the coach has responsibility to take care of themselves.
- About 20% mentioned how to address or solve the situation, e.g. take on less work, hand over clients, pause sessions, as well as the impacts of such solutions, e.g. stopping a session vs. continuing with low quality. Others questioned the extent to which coaches/mentors can 'park' stress at home and perform at work.
- Only a small number suggested bringing up this dilemma in own supervision sessions.

Experts' opinions and suggestions:

- This scenario raises the question of the coach's ability to perform. This is clearly explained in the Global Code of Ethics section 4.2: "Members will be fit and healthy enough to practice as a coach or mentor. If they are not, or are unsure if they are able to practice safely for health reasons, they will seek professional guidance / support. Where necessary / appropriate, the coach or mentor should manage the ending of the client work and refer the client to alternative support."

- In addition, the coach needs to be open and honest with their clients to explain that they may not be fit and healthy to deliver value. Section 2.7 of the Global Code of Ethics must also be kept in mind: "members will accurately and honestly represent the potential value they provide as a coach or mentor".
- The coach may also wish to refer this issue to their next supervision session.
- It is interesting to see that the Global Code of Ethics is clear and direct in this case: if the coach is unfit, they should terminate the relationship and refer the coaching to somebody else. However, there is also the option to interrupt or terminate a session and make a new appointment, thereby at the same time modelling ethical behaviour on how to act in cases of being overburdened.

Reflecting on the responses:

- Across the 180+ responses there is a sense that we have all experienced moments of inability to perform but very few said how they have personally overcome such circumstances. **Should we create spaces to be able to explore this more openly, such as in conferences or through the accreditation process?**
- Should supervisors assess in each supervision session the coach/mentor's ability to perform? With an opening question: "Has anything been happening that might impact upon your ability to perform to your highest standards?"
- **Taking care of self could also be a regular topic in supervision; a topic that could use more reflection and discussion amongst the members of the profession.**

Dilemma 3

You are half-way through an executive coaching engagement with a leader who has a stated goal of improving her leadership skills. She becomes upset as she relates harrowing childhood experiences of years of physical abuse - experiences which she has never spoken about before. What issues does this raise for you?

Summary of comments:

- Over 80% of the respondents referred to boundary / professionalism / integrity issues being raised by this dilemma. Respondents said they would refer to others (most suggest counselling / therapy), explain that they were not qualified to address the issues raised, and/or explore the appropriateness of continuing. Some respondents also questioned the extent to which they would know if they were competent to continue coaching, or know the point at which they would stop being the one listening and cease the session, and/or explore the issue with their supervisor.
- A few felt that there was not yet an issue, and that it would be acceptable to listen while the coachee re-visits parts of their life. During this process they would be conscious to ensure trust and that the coachee did not feel threatened, avoiding the scenario of stepping away once she had opened up. Respondents noted a balance between listening and suggesting she speak to others. The issue of confidentiality raised by approximately 20%, who were aware that there are legal aspects of abuse.
- Some respondents with a life coaching / therapy background say they may change the form and goals of engagement with client agreement.

Experts' opinions and suggestions:

- Key terms here are "trust", "listening" and "refer". In this situation it is vital that the client's trust is retained. Listening (or more specifically, 'listening only') is a powerful instrument to achieve this. However, help from a differently qualified 'helping professional' may be necessary (e.g. a counsellor), provided the client herself feels the need for it. It may be that only sharing the experience is enough, but it is quite

possible that it is not. As long as the coach is clear about the fact that – as a coach – they are not qualified to deal with this issue in a therapeutic way.

- This highlights the importance of clarifying the nature of the relationship from the onset: it should be clear that it is a coaching relationship, not a therapeutic one. But should the coach also have the qualifications to act as a therapist, it may be an option, with client agreement, to change the relationship to a therapeutic one.
- The coach must decide if and how they would continue their conversations with the client. There is a need to maintain integrity, namely these two sections of the Global Code of Ethics: "Members will accurately and honestly represent their relevant professional qualifications, experience, training, certifications and accreditations to clients, sponsors, members, coaches and mentors" (section 2.6) and "when talking with any party, members will accurately and honestly represent the potential value they provide as a coach or mentor" (section 2.7).
- In addition, the coach needs to decide if they are able to "meet the needs of the client and operate within the limits of their competence". If unsure of this, "Members should refer the client to more experienced or suitably qualified coaches, mentors or professionals, if appropriate." (section 4.1).

Reflecting on the responses:

- This dilemma raised more questions than some other cases in the survey – questions mainly around 'how to know when I am not qualified?'. **Perhaps coaches and mentors need to better understand the boundaries between a client best benefiting from them or from another 'helping professional' such as a therapist or counsellor.**

Dilemma 4

Your client has been stealing funds from their employee (you did not know this during your coaching of him). Four months after you finished the coaching sessions his company's legal counsel asks for access to your coaching notes. What issues does this raise for you?

Summary of comments:

- Over 75% of the respondents said they would decline to share such confidential information without the consent of their client, unless there is a legal obligation.
 - A small number of respondents questioned whether they would still have notes, the length of time they should keep them, whether they *should* keep them, the consistency of their own notes, and indeed, whether they took notes at all.
 - A few said they would refer the legal counsel to the EMCC's Code of Ethics in relation to breaching confidentiality. Others said they would speak with their supervisor, indemnity insurer, and/or a lawyer.
 - In replying to the request, the respondents suggested that maintaining reputation with company was an important consideration. They said they would need to talk to them so they would understand the ethical dilemma. A few respondents questioned whether the company had paid for the coaching and therefore had a right to the notes, and whether anything illegal was actually shared in the sessions (if illegalities were discussed there might be an obligation to share this with others). Other suggested they would reply and state that the stealing of funds was not covered in the coaching.
- In terms of the questions about whether the coach makes or stores notes, there is a clear expectation that the coach does store and maintain such records in such a way that "complies with all applicable laws and agreements." (Global Code of Ethics, section 2.10).
 - As with all of ethical dilemmas in this report, a coach or mentor is encouraged to raise any of their potential or actual challenges, issues or dilemmas in their supervision sessions.

Reflecting on the responses:

- In contrast to responses to other dilemmas in the survey, this dilemma seems to vex many respondents, with some wondering where would they seek advice.
- Should the EMCC attempt to frame a range of responses, for example, about note taking?
- Would the setting up of an Ethics Advisory service be useful on behalf of the EMCC? As the legal background may be different from country to country, this option may be considered by every EMCC affiliated country and organisation independently.
- Almost no one mentioned referring to the Global Code of Ethics. Therefore, the awareness of how the Global Code of Ethics can be utilised could be enhanced.
- This situation again illustrates the importance of the contracting stage: what was made clear about confidentiality towards the sponsor? Does it include notes? In this case it must be stressed that the request for the notes came from the company's legal counsel and not from the police or the judiciary.

Experts' opinions and suggestions:

- A key question here is: Does this request fall under the point that confidentiality may not need to be maintained unless a release of information was required by law? The legal counsel may have to obtain some kind of court order to compel such a breaking of your confidentiality with your client.

Dilemma 5

You are a newly qualified internal coach and you are keen to coach members of your own team. What potential issues does this raise for you?

Summary of comments:

- 90% said they would refuse to coach members of their own team. Some were aware of companies that had stated this as a rule (some also suggested this was also the EMCC's stance).
- Over 50% said there was a potential conflict of interest (and a small number referred to the EMCC's Code of Ethics). Some questioned whether people would want to be coached by their own manager, whether they would be able to open up, and whether the manager would be impartial / unbiased. Others suggested that the line manager was often the issue why coaching was being used.
- Over 50% also mentioned confidentiality and trust issues, and questioned how to ring fence what you learn as a coach. Other comments included the degree of independence / neutrality in internal coaching relationships, the impact of power relations biases on coaching benefits, and how coaching inexperience could negatively affect the relationship.

Experts' opinions and suggestions:

- Our advice is not to engage in such coaching given that the hierarchical situation means the client would be unlikely to feel able to open up and share with their coach. A person's manager can be one of the main topics of conversation in a coaching engagement, and as such, a conversation of this kind is unlikely to be open if the manager is the coach. This way the coach cannot be fully independent from the issues the coaching is about.
- However, if the coach decides to proceed with such coaching, despite the above

advice, it is necessary that the coach be able to abide with (and to also share with their client) the following aspects of the Global Code of Ethics:

- Proper contracting (sections 2.2 to 2.5)
- To be clear on the "potential value they provide as a coach or mentor" (section 2.7).
- To be clear that confidentiality can be maintained and towards whom (section 2.9)
- To be clear that there are no actual or potential conflicts of interest.
- To not seek to exploit the relationship in any way (section 2.16)
- To distinguish the "coaching or mentoring relationship from other forms of relationships, such as a friendship or a business relationship" [i.e. in this scenario a 'line manager – direct report relationship'].
- To terminate the coaching engagement if "a conflict arises (we would even suggest "might arise") which cannot be managed effectively" (section 2.20).

Reflecting on the responses:

- There was a high level of concern regarding the situation presented, suggesting a high level of awareness of the potential challenges of the situation.
- General professional experience suggests that a coach should not coach one's own team members. Instead it is recommended that team members – if necessary – should be given a coach not in their reporting lines.

Dilemma 6

A client you are mentoring shares that he has broken his company's rules and policies in some way. How might you respond and why?

Summary of comments:

- 80% say they would attempt to explore and understand the issues, and ask: Is this breach illegal? Understandable? How is it explained/justified? They said they would try to recognise that it may be situational or contextual, in that sometimes rule breaking may be good for an organisation to change or be open to new ways of doing things. They suggested they would act as a mentor to be open-minded and ask specific questions such as 'Why did you choose to do what you did?' 'Why are you telling me about your wrong behaviour?' 'What do you intend to do now?'
- At least 25% said they would share their need to disclose anything that was illegal, and remind the mentee that they are paid by the company and therefore also have its interests in mind.
- Some respondents said they would encourage the mentee to own up and to be honest with company if appropriate, that is, if the action was illegal. Some also suggested having a 3-way discussion with someone in the organisation.
- A small number suggested stopping the mentoring if the mentee refused to take responsibility and inform the organisation (if that is what was requested of them).

Experts' opinions and suggestions:

- This scenario is one where the coach and their client should first of all discuss why the client has done this and what the client plans to do about it.
- In the scenario where the client does not have the intention to do anything, and the extent to which the breaking of company's rules and policies can be construed as illegal activity, the coach must consider

whether confidentiality needs to be broken. In such a situation the coach may decide that the client's employer needs to be informed of the activities. It would be preferable that the coach leaves the client time to take action themselves before the coach does.

- The ethical issue here is that the maintaining of confidentiality is sacrosanct unless there is a requirement that a "release of information is required by law" (see action 2.9 of the Global Code of Ethics). For this reason, the Global Code of Ethics states in section 2.11 that "Members will have a clear agreement with clients and sponsors about the conditions under which confidentiality will not be maintained (e.g. illegal activity, danger to self or others etc) and gain agreement to that limit of confidentiality where possible."
- In the event that activities are not deemed illegal but still a breach of company rules and policies the coach should engage a range of coaching discussions to help the client gain a clear understanding of the causes, motivations, potential and actual impacts and consequences of their actions.

Reflecting on the responses:

- Understanding the fine lines between confidentiality and the need to disclose what is shared in sessions with a sponsor / company or other party (e.g. police) is still unclear for a number of respondents. There was a sense from the replies that almost no respondents had first-hand experience of having faced such a dilemma.
- Official, EMCC approved, guidelines, and further education regarding these fine lines may be useful for the broad community of mentors and coaches.

05 Pushing the boundaries

When 76% of coaches/mentors report discussing ethical issues in their supervision, it is fair to say that coaches are experiencing 'arresting moments' which involve sense making of some potentially fuzzy areas (Wall et al, 2017b). There are some areas which are perhaps more obvious than others, such as the blurring or crossing of boundaries, conflicts of interest, challenges to confidentiality, and the potential harm to others. Indeed, the survey suggested all of the respondents were aware of the latter of these in terms of their own fitness to practice.

Yet having to deal with such complexity can be a challenge, so much so, that it can be overwhelming to be aware of all the potential ethical issues. As revealed in the survey, some respondents even considered it to be practically 'impossible' to keep up to date with legal requirements (and therefore do not know if they comply), especially if they operate across country boundaries. For some, such a stance might involve a level of risk which would prohibit working across such boundaries, whereas others will rely on their networks and cultural knowledge to feel assured about the risks.

Coaching professional bodies have a role in such circumstances to support and develop the coaches' complex professional judgement which builds over time, through engagement in diverse contexts (Wall et al 2016; Wall et al 2017a). Yet there is also a role to advance the standards by which we are making professional judgements in situ. This advancement is more about pushing the boundaries of what we currently know, and involves raising questions and ideas with a view to prompt reflection (for those who have not reflected in certain areas), or prompt further reflection (for those who are already on a journey of reflection). This is essentially about spotting and confronting 'coaching taboos' (Clutterbuck, 2017: x).

A useful prompt might be one of the most challenging and significant movements in the twenty-first century; the notion of sustainable development, where we shift from economically-driven growth to a more holistic notion of development which includes our impact on planet and its co-inhabitants (e.g. animals, insects, people) (Wall, 2017; Wall, 2018). Though the relevance of such ideas to coaching practice may not immediately relevant, it can perhaps become

more tangible when we are more specific about the 17 areas that the United Nations officially associates with sustainable development. These are listed in the table below.

Figure 1 The United Nations' Sustainable Development Goals (based on UN, 2017)

1. End poverty in all its forms, everywhere
2. End hunger, achieve food security and improved nutrition
3. Ensure healthy lives and promote well-being for all, at all ages
4. Ensure equitable education and promote lifelong learning opportunities for all
5. Achieve gender equality and empower all women and girls
6. Ensure availability and sustainable management of water and sanitation for all
7. Ensure access to affordable, reliable, sustainable, and modern energy for all
8. Promote sustained and inclusive employment, and decent work for all
9. Build resilient infrastructure and foster innovation
10. Reduce inequality within and among countries
11. Make cities and human settlements inclusive, safe, resilient and sustainable
12. Ensure responsible and sustainable production and consumption
13. Take urgent action to combat climate change and its impacts
14. Conserve the oceans, seas and marine resources
15. Protect and promote sustainable use of terrestrial ecosystems (including biodiversity)
16. Promote peaceful and inclusive societies and accountable institutions
17. Strengthen the means of implementation through global partnerships

Some coaches will notice that they work in areas which are intimately involved in some of the issues, which may indeed prompt thoughts about one's own role in and through coaching. This is especially the case if it relates to enhancing the profitability of organisations directly involved in, for example, extractive industries. For some, this will reflect their own life missions and values.

However, other prompts for reflection around the area of sustainable development are subtler. Three examples have been chosen to reflect the challenges of modern workplaces and development (Wall, 2017; Wall 2018); they raise issues which are seemingly present in the responses of the survey, such as health and wellbeing, though to other areas which were perhaps less explicitly present (e.g. responsible consumption). Each of these are now discussed.

Coach as steward of health and well-being?

To what extent does the coach consider or deliver the aspect of sustainable development related to “*ensure healthy lives and promote well-being for all, at all ages*” (sustainable development goal 3)? The survey suggested that coaches do consider aspects of this in their coaching.

This seems directly relevant to a coach and their coachee, particularly to the adult population (and the younger generation if this is their coaching focus). To what extent, however, do we consider the wider knock on or systemic effects in relation to the health and well-being of the wider organisational context, which is far more removed from the coach (and potentially the coachee)?

For example, do we sense the urge to do something when coaching a senior leader that is about to institute a new decision making policy which intends to significantly restrict autonomy? Here, we may know that workplace autonomy is linked to experiences of stress in the workplace.

Beyond this, do we consider the actual or potential impacts on the wider health and well-being of the communities that the organisation is part of? For example, a senior leader who is about to take over a community centre which is the cornerstone of a local community?

Does the coach take it upon themselves to push these sorts of agendas when it is deemed appropriate to do so? Or is this beyond the practical scope of the contract that may have been established at the start of the coaching relationship? What if the health and wellbeing of others is a salient and central part of the value base of the coach? What about if it is a moral obligation?

We may deem it as beyond the scope of a coaching relationship, but if we do, what does that say about how we are choosing to respond to the unhealthy practices in organisations that we do become aware of? Such circumstances do occur in coaching practice, but are complex and **require us to position ourselves as coaches; position ourselves in relation to our values and missions, and to wider societal challenges which are so prominent today.**

Coach as steward of inequalities?

The behaviours of leaders and influential people across the globe have gained increasing attention in the last couple of years, especially in relation to how they promote in-equality in workplaces (Wall et al 2017c; Wall 2018). Yet it is not just the scrutiny of these leaders that has gained attention, but the scrutiny of the people around such influential people who were seemingly complicit in allowing such behaviours to perpetuate. The extent to which these behaviours are known in public or private spaces is currently unknown for many of these cases, but the main issue is how influential people in society – such as coaches and mentors – position themselves in relation to “*achieving gender equality and empower all women and girls*” (sustainable development goal 5).

Within coaching and mentoring, there are practitioners who explicitly make it their life’s work to support the development and progression of women in workplaces, especially in relation to leadership, management or other influential roles, or more generally in sectors which may have a disproportionate number of women in influential roles such as retail, banking, or politics.

It is intuitively logical to assume that such practitioners will have an attuned sensitivity to the experiences, challenges, enablers, and opportunities women can experience. By the same logic, other practitioners may not be so attuned to such circumstances. In such cases, how does the practitioner position themselves on this particular agenda? And how does the industry sector or occupational grouping influence how the coach positions themselves in relation to these issues?

For example, do they focus closely on the precise remit of the contract agreed at the start of the coaching or mentoring relationship? Do they find ways to raise the issues in a way which is sensitive to the coach's contextual knowledge of the pathways to influence in the organisation and the situations they find themselves in? Or do they make a point of attempting to educate and raise awareness of such tensions in workplaces?

Moreover, might observing seemingly discriminatory behaviours on a construction site necessitate a different response than in a doctor's surgery? Or, perhaps some might judge that the ethical thing to do for a coach in any setting is the same: some will 'do nothing' (e.g. because it is not something a coach *should* concern themselves about, or because it might break the contract); whereas others will 'do something' (e.g. because it is something a coach can and *should* challenge in their role, or because it is important to the change work identified in the contract).

Coach as steward of responsible consumption?

Perhaps, for most coaches and mentors, what might appear as the least obvious aspect out of the three discussed here, is "*ensuring responsible and sustainable production and consumption*" (sustainable development goal 12).

To take a live and real scenario: if you were to coach a sales director who is required to fly across the world as part of their job, what are you noticing? We assume we of course notice the words they use, the emotional and bodily reactions to your conversations, and maybe their commitment to the schedule of coaching sessions.

But do we notice aspects of consumption, such as the tonnes of pollution from such frequent flying and driving? Do we notice the amount of plastic being used, generated or wasted by the products being developed by your clients? Do we notice the forms of 'excess' in their (and our own) life and work which might go to feed or sustain other

communities who are less fortunate? Or are these 'taboos', kept hidden out of reach of coaching practice?

In this case, how do we position ourselves in relation to such aspects? For example, do we think that these issues are:

- *relatively* irrelevant and unimportant?
- *relatively* important but are not important to the client's agenda?
- *relatively* important, but I can't or do not want to influence through my coaching?
- *relatively* important, but I do not know how to influence through my coaching?
- *relatively* important, and I already tackle such things in my work?

Do we acknowledge these sorts of positions when we select the contracts we want to work in? Do we carefully plan certain groups of clients so that we can manage the sustainability of our own coaching business? Do we acknowledge the tensions and dilemmas for a longer term landscape? Or do we avoid such circumstances in the first place by accepting certain roles which are more aligned to our values? The challenge is that there are no 'tick box' like answers, but ones which need reflection, sense-making, the ability to deal with vague and ambiguous circumstances, and a sense of navigation. Or maybe we trust our intuition to inform us and don't explicate our thinking and choices on such matters? (Wall et al 2018).

Whilst this section highlighted three areas to amplify and consider as reflective prompts, there are many other wider issues in helping others develop in holistic and sustainable ways. This is the realm of sustainable development, and the United Nations' Sustainable Development Goals can provide an unorthodox reflective prompt for coaching and mentoring (United Nations, 2017). Most intimately, it helps us reflect on our relationship with the aspects of sustainable development, to enable us to become closer to finding our own professional boundaries and positioning within global challenges. Such complex reflective work is discussed in the next section.

06 Navigating tensions and dilemmas: the role of values

Coaching is a complex phenomenon, which as discussed earlier, is increasingly applied across diverse contexts across the globe. As we scan this complex landscape, we share the view of David Clutterbuck, that as coaches:

our desire to feel morally correct is deep-rooted, to the extent that we appear to have an in-built moral equilibrium. If we do something unkind or illicit, we tend to compensate with an act of kindness that resets the balance. And vice versa! Ethical behaviour in the workplace is influenced by many subtle factors, of which we are scarcely aware (Clutterbuck, 2017: x).

In this section, we encourage you to engage in a critical reflection on your own coaching practice. We invite you to explore aspects of your practice such as; who you are when you coach; where you are when you coach (and why); and how you coach (and why). Building capacity, capability and confidence for navigating ethical moments in day-to-day coaching practice is dependent on our willingness to acknowledge our stance as a coach.

Before we discuss how we might navigate ethical dilemmas, consider for a moment how you currently see the people you coach. We offer two perspectives. Firstly, do you hold a view where you believe people hold the solution? This is something that Simon Weston defines as the 'celebrated self'. Or are you perhaps tempted to think that your clients need your rescue? This is something Simon Weston defines as the 'wounded self' (Weston 2012).

Now consider how your view may resonate with your professional values. For example, one of the authors of this report began her coaching journey with a professional background in healthcare. She was struck by the contrast of a contemporary emphasis of 'doing *with* people' in contrast to a more traditional historical picture of 'doing *to* people'. The lens we use, and the perspective we hold, will impact on the quality of the relationship for those with whom we coach.

The story below is shared by another one of the authors of the report; a set of reflections about cultivating ethical maturity.

A story from practice

A few years ago, I was coaching a director at a medium sized services company. The invitation seemed to be quite straightforward at the beginning: the CEO and the HR leader had witnessed a decrease in the engagement and the performance of a particular service unit – as measured by an internal survey – and had offered coaching for the unit director to support her in sorting out the situation. Let's call the director "D".

As a "winner" of the coach selection process "D", the CEO and I sat down together to contract the goals and focus of the process. The expectations were clear: everyone agreed that the goal of "D" was to increase engagement and the coaching was to support her in all the ways that is necessary to do this. A decent time-frame was set for the assignment.

We started work, and we had good sessions (according to the client as well as my instincts). Then, one day, I received a call from HR: the CEO would like to hear details about the coaching process. Although I always contract in detail for confidentiality I was surprised. Back in the earlier days of my practice such a request evoked fear in me: something is not right, I must have missed something at the contracting... let's check my notes. Nowadays I trust my contracting process, so I reacted with genuine surprise, and told the HR representative that it is outside of our contract for me to provide any details: "D" and the CEO should talk through such questions themselves.

I had to be persistent in this call, as my message was not really heard. I enquired about the rationale for such a conversation, and the focus of the CEO's curiosity. The answer was that they could not yet see a desired change, that is, to become more direct and task focused. The CEO wanted to explore what was happening in relation to this.

I could not recollect this goal from the contracting process, so after thanking HR for the information, I closed down the conversation, by saying that I would not make any further moves without the consent of "D" – acting without consent would damage our trust and would therefore make the investment of the company useless. I framed my decision as a "no lose" option for the company.

In our upcoming session with "D" I brought up the topic. In the session we explored the current board-level relations from the perspective of "D". Both of us had realised that the communications between "D" and the CEO had broken down, and that "D" had the feeling that she was pushed into a role and way of being that was not acceptable for her. And this would not be acceptable for her team. There was a directive, pushy culture in other units of the company, but she did not wish to bring that to her teams. In the light of this deeper exploration, the assignment – at the unspoken level – seemed very different now: it had shifted from "support the growth" to "help us break her in".

My interpretation was that the shift was absolutely against the principles of my work – responsible free choices, personal growth and autonomy – to name just a few. I had a number of parallel thoughts.

One was that the process has to end in this form, as there was a non-OK / non-contracted expectation that I did not want to accept. At the same time, I also felt some internal invitation to rescue my client – I did not want to leave "D" in such a situation. And as I was working as part of a bigger company I had business concerns regarding the outcomes of my actions. In line with my values I wanted to stay clear.

I brought my interpretation of the situation into supervision and after checking it with the management of our company I decided to offer a new 3-way meeting to re-align the process, instead of either providing information or unilaterally leaving the process (and/or potentially offering a private process for "D"). The offer was accepted, but the meeting did not go well.

The CEO and "D" offered different interpretations regarding the nature of the challenge "D" was facing, thus the resolutions were also very different. I facilitated the meeting, and I considered the outcome to be neutral/slightly negative: we could have carried on the coaching, as "D" had insisted on being the leader, and I persisted in upholding the values of coaching. However, the CEO was clearly not satisfied, and was definitely not actively supportive.

The rest of the process took a general leadership development direction – supporting "D" in her original goal. "D" left the company 3-4 months after our process had ended. I did not get an invitation to coach there for quite a long time. I did feel sad about that, but I was happy about my own persistence towards my values.

Since this situation I have continued my reflections. For me, the chain of events described above generated a number of insights and helped me in further developing my ethical practice. In retrospect I can catch the moment of compartmentalization – "putting away" the feeling of anxiety, and some automatic thoughts regarding myself as I received the call from HR regarding the further needs of the CEO.

Persisting in not disclosing any further information, and then going for the second 3-way meeting gave me a real-life experience of my lived values. Although I did have a detailed appreciation of my values at the time, the episode elevated my awareness of them and my dedication towards them; I was tested and I felt I succeeded.

It became very clear to me that confidentiality and trust – the relationship itself – is really important to me, as well as autonomy – the belief that my client can handle the challenge by herself. Being conscious of these values helped me to navigate the situation and come to a solution that was positive for "D" and had a positive potential for the company as well.

My interpretation is that they did not leverage this potential. In hindsight, building time to reflect on these kinds of experiences has helped me to be clearer with my practice; helping to identify and navigate ethical moments in my coaching relationships. I pay more attention to contracting and to exploring some seemingly obvious aspects of the situation. I have been approaching these situations with an even stronger ethical coaching mind set – supporting the exploration of all parties – from a range of perspectives, for example, of coach, of coachee, and of the commissioner.

Stories from practice, whether written or told, help to illuminate the kind of feelings and behaviours that are evoked through the ethical moments that emerge in coaching relationships. The art of navigating ethical moments forms a metaphorical journey. Whether novice or seasoned practitioners, our responses to ethical moments form patterns that include the **compartmentalisation** of ethical issues, or **disavowal**.

Understanding our values is perhaps the first step towards navigating ethical tensions and dilemmas in coaching conversations. We hold the view that ethical coaching, as every-day practice, requires a step back from earlier traditional models of learning, which emphasised linearity and process. In contrast, coaching can open opportunities for developing greater understanding of our 'self', holding implications for building and sustaining ethical coaching relationships and for supporting others across professional contexts.

Consideration of 'who' we are when we coach, 'where', and 'how' we coach, are important factors for cultivating a reflective space, in which we can raise our awareness about ethical moments in coaching, drawing such matters more into our conscious awareness, and thus our every-day thinking and in consequence enhancing ethical practice. Specifically, when we consider the question of 'who is the 'you' who coaches' it can provide new insight around our personal and professional values and contexts that underpin our practice. When we consider the question of 'where' we are when we coach, we can find new insight into the organisational and cultural contexts in which we may choose to coach.

And when we consider the question of 'how' we are when we coach, it can provide greater insight into the theoretical models and approaches that underpin our coaching (Iordanou et al 2017). Each are intrinsically linked, guiding us to navigate issues across diverse professional and cultural contexts (Wall et al 2017b).

Discovering your personal values

Understanding our values is an on-going journey of discovery and learning. So often we think we know ourselves well, yet as we explore our personal and professional values more closely, we often discover new insights (Iordanou et al 2017). We also become more aware of how our values influence and impact on our coaching practice. Indeed, the dialogic nature of the coaching practice, that is premised on conversation and discourse in order to construct meaning (Alred et al 1998), is the cornerstone of the learning that ensues within the coaching relationship. We consider the nature of learning that is generated in coaching to be non-linear. This is because it is the product of interaction with others. Against this backdrop, our learning about our values can be seen as "socially constructed, so that we create rather than discover ourselves" (Alred et al 1998, p. 14). The story above echoes this sentiment. So, in relation to your own reflections, what are your core values?

Articulating your professional values as a coach

Having considered your personal values, we now briefly consider the significance of professional values as a coach. Values, personal and professional, shape everything we do in our coaching practice, and in our everyday lives. Indeed, values underpin human agency. It is significant that every decision we make in our coaching conversations is influenced by our values and beliefs. Perhaps most importantly, we need to pause to consider the extent to which we are consciously aware of our values, or not.

Whenever we engage in a coaching interaction, we bring a particular attitude, which are premised on our beliefs. In essence, our attitude is the "mental filter through which we experience the world" (Keller, 2007, p. 12). Ultimately our attitude, which is governed by our values, will always influence the coaching relationship and our potential for navigating the

ethical moments that emerge within each interaction.

Our values and attitudes are intrinsically linked. Thus, we need to explore these more consciously, in order to enable us to understand our choices, our behaviours and our actions as coaches for effectively navigating the ethical terrain we face.

Principles underpinning your coaching practice

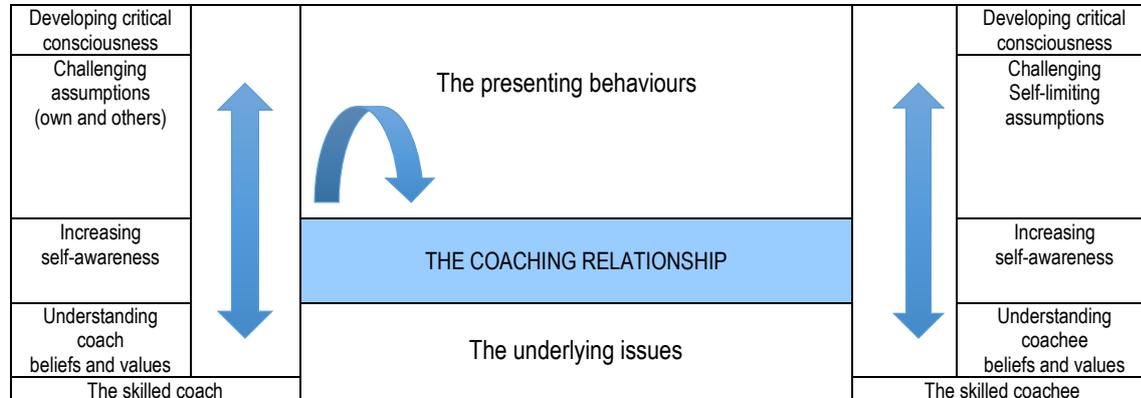
Understanding our personal and professional values harnesses the potential for navigating ethical moments by understanding both our self and our coaching clients better. In the absence of this self-awareness, we are more likely to simply respond to the behaviours we observe on the surface. Beyond this a number of additional factors impact on the principles that

underpin our coaching practice including for example:

- The corporate culture of the organisation in which we coach
- Government policies that influence our professional domain
- Commonly accepted societal imperatives

Through our earlier research on values and ethics in coaching we recognised that understanding our values is a central resource to be able to navigate ethical issues and dilemmas. Understanding our values helps us to become more aware of the underlying ethical issues that may be hidden under the surface of coaching relationships and build the skills to permeate the relationship more deeply to address these (Iordanou et al 2017). The diagram below seeks to illuminate this.

Figure 2 Surfacing hidden ethical issues and moments



Against this backdrop it is important to consider the ways in which we can enable the surfacing of underlying ethical issues. We discovered that asking 'good questions' during coaching conversations, helps to create a reflective space, which can stimulate a richer exploration of our own values and ethics, as well as those of others. In particular, we found that questions, if considered as a tool, can be used by coaches to, in effect, turn the mirror on themselves, in order to reflect on their

professional values (Iordanou et al 2017). We wonder if, like us, you notice that by looking in a metaphorical mirror in this way, and by asking questions about your values, you can create a process that can cultivate new insights into how you face ethical moments, regardless of whether you are a novice or expert coach.

Establishing a moral compass for navigating ethical moments in coaching

In our discussion above we hold the view that an ethical coaching practice firstly requires us to understand our self, for example, our personal and professional values. Navigating ethical moments however is an ongoing journey. Therefore, developing an ethical coaching practice requires us also to establish a moral compass as a way of navigating ethical moments effectively, as an embedded part of our everyday practice.

Thus, we encourage reflection in, and on our coaching in order to truly understand our thoughts and actions around ethical moments of choice.

Being reflective in our practice helps us to enrich our understanding of our personal and professional values. Iordanou et al (2017) argue:

When we start to critically reflect back on our reactions in the coaching relationship – rather than simply consciously acknowledging such reaction – we reach a tipping point. This is where the process of reflexivity begins. This is not a linear process; rather the act of reflection and reflexive practice ebbs and flows.

The challenge, we have found, perhaps lies in learning to recognise the difference between the art of reflective and reflexive practice in coaching, and seeing reflexivity as a deeper kind of 'reflection on our reflection' which allows us to enhance our ethical maturity. This is represented in the next diagram.

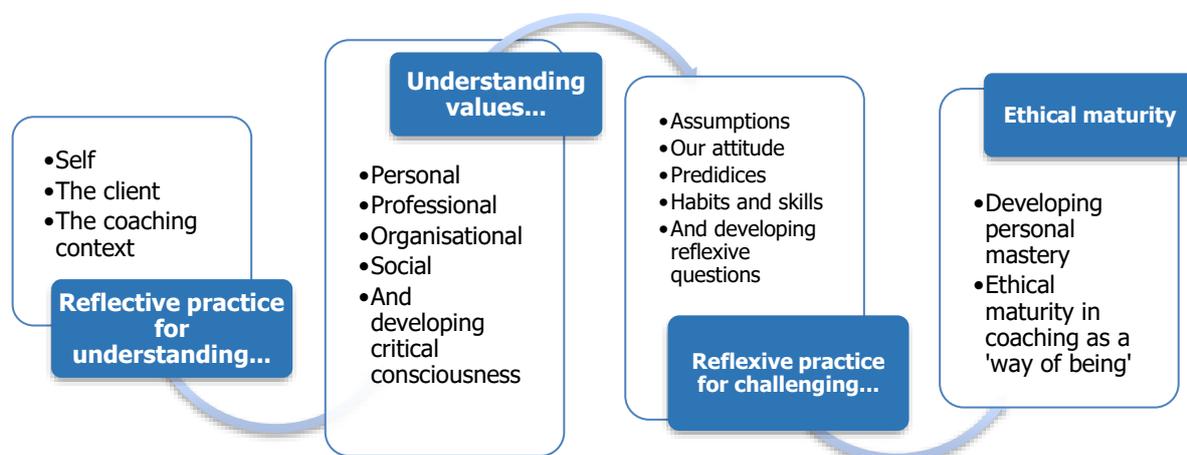


Figure 3 The reflexivity chain for ethical coaching (based on Iordanou et al 2017: 97)

We hope that reflecting on your personal values in the way we describe above will generate new insights: firstly into your 'self' and secondly your coaching practice. A commitment to understanding self and our values within the wider context of coaching is key to taking ethical responsibility in the coaching relationship.

There is no single theory that accounts for navigating ethical moments in coaching. Rather:

as we become more seasoned in our coaching practice, it is as though we develop a tool-box that, over time, we fill with theories, knowledge, models and our learning from experience (Iordanou et al 2017).

Navigating ethical moments in coaching requires us to develop the art of deciding on a combination of approaches; our choices are influenced according to our understanding of our self, together with the coaching context. Thus, reflecting on our personal and professional values is the foundation for building an ethical coaching practice.

Through this kind of investment in understanding our self, we begin to better understand who we are in the coaching relationship, where we coach (and why), and how we coach (and why).

Perhaps most significantly, we move from the uncertainty of ethical moments that we described earlier, to using our moral compass in order to navigate an ethical coaching practice. In the following section we look more closely at the practical tools for cultivating promising practises.

07 Promising practices for embracing values and deeper ethicality

In the previous section we focused on the significance of understanding personal and professional values, and beyond this, the institutional or organisational values that underpin a coach's practice, as a prerequisite for ethical coaching. In this section we introduce an array of approaches and tools that coaches can use to reflect on and, in turn, understand their values and, hopefully, consciously build and maintain an ethical coaching practice. These tools, which can form an integral part of the coaching process include: storytelling; embracing creativity; mindfulness; and critical thinking.

Story and storytelling

The writing and telling of stories can be utilised as an approach for self-discovery and for cultivating in-depth self-awareness (Wall and Rossetti 2013). According to Bolton (2014) stories can be used to illuminate the iterative nature of understanding ourselves and our values, and allow us to explore an event more deeply from different perspectives. For example, if we imagined for a moment that today is a new chapter in your life. How would it begin? What would the main plot be? How would it end?

Bolton (2014) shows us how, by capturing a story of an event, such as navigating ethical moments in coaching, experiences can be explored and revisited over time. Similarly Wall and Rossetti (2013) encourage the purposeful analysis of stories to generate insight, including aspects including the actors or characters, the plot, the twists, the resolution or moral of the story.

This technique has proven particularly fruitful in coaching practice (Gray, 2007). As we create new stories and retell old ones, with the passage of time, we make new connections and understandings for addressing ethical issues. This iterative process leads to a richer kind of learning and self-awareness, and allows us to reflect more deeply on the values that underpin

our personal life and professional coaching practice.

Embracing creativity

Using arts-based approaches can assist us in cultivating an ethical coaching practice and, importantly, in enriching our understanding through the reflexive processes linked to our coaching work. Taylor and Ladkin (2009, p. 58), for instance, suggest that by making art about our own experience we can enhance self-awareness, stating that:

an object that can contain contradictions (logical and, or moral) as well as unrealized possibilities that are not constrained by logic or limitations of our current lives. In this way, art making enables us to draw upon, and subsequently reflect on, a deep well of 'unconscious stuff'.

We can consider Whitaker and Rhodes's (2004) approach of creating and wearing masks, as a medium through which we can become more aware of the metaphorical 'masks' we put on during our coaching practice.

By engaging in a simple process of creating and wearing different masks, we can represent the different personas we might assume during alternative situations, and thereby begin to notice the alternative masks of coaching we assume in the variety of our practice.

Mindfulness

Holding its roots in Buddhist teaching, mindfulness is a valuable tool through which we can gently reflect on our values and, consequently, develop an ethical coaching practice. In a widely used definition, Kabat-Zinn (1994: 4) describes mindfulness as "paying attention in a particular way: on purpose, in the present moment, and non-judgementally". Within the context of coaching, mindfulness

simply means focusing in the present moment, noticing, and being consciously aware of what is taking place and what is not taking place; what is said and what is not said; what is felt and what is not felt.

Mindfulness, therefore, “reflects a particular state of consciousness, typified by relaxed, non-judgmental awareness of moment-by-moment experience” (Spence, 2015: 20). In its simplest and purest form, it means being constantly mindful of what is taking place for you, as the coach, before, during, and after the coaching practice; what is going through your head; what sensations you feel in your body; what emotions are evoked; and what reactions you are having, overall, to what is happening or not happening during the coaching process.

Critical thinking

When it comes to being conscious about ethics in coaching, there is always a risk that we might think of widely accepted standards and models as recipes or linear steps, as if there is only one right way of doing things.

However, as each individual is unique, it is important to enable the development of individual approaches for understanding our values. Thinking critically helps us to do this. Ethical issues vary according to the perspective of the coach, the values of individual coachees, and the different contexts in which coaching takes place.

As coaches, we need to think critically and question fundamental assumptions (Bolton, 2014, p. 46), since (arguably) almost every action we make is framed by or based on assumptions. Thinking critically about our ethical decisions and actions affords the opportunity to critically explore and challenge assumptions. To do so, we can use the simple technique of questioning that is so inherent in the coaching practice.

Exactly as we ask our clients questions, to facilitate their critical analysis of statements and thoughts, we can employ the same process of questioning that can activate our own critical thinking mechanisms, asking questions such as how? What if? What happens next? In other words, thinking critically shifts from the descriptive to the analytical, in order to achieve greater insights into our values and ethics as coaches (Iordanou et al 2017).

In conclusion, we concur with van Nieuwerburgh (2017) who argues that being consciously aware of, and reflecting on, our values and principles as coaches, will enable us to recognise and approach ethical issues as they arise with confidence and competence.

For this reason, in this section we proposed four constellations of tools and approaches that coaches can use in order to consciously reflect upon the personal, professional, and even institutional values that underpin or affect their coaching practice and which, ultimately, can help them develop and practise ethically.

We are hopeful that utilising some or all of these tools, will enable you to embark upon “a creative adventure, right through the glass to the other side of the silvering” (Bolton, 2014, p. 116), perhaps gaining new insights into yourself and your coaching experiences from a range of perspectives.

Yet it is important to remind ourselves here that, just as there is no single theory that can help us develop an ethical coaching practice, neither is there a single recipe of practical approaches and tools that will help us achieve this goal. For this reason, employing a variety of techniques with determination and curiosity, and in accordance with context in which coaching occurs, we believe, might be the most appropriate approach. Ultimately, regardless of the means, a commitment to understanding ourselves and our values within the wider context of coaching is key to taking ethical responsibility in the coaching relationship.

08 Conclusion – invitations to inquire and experiment

The survey and subsequent commentaries in this report were designed to act as exploratory prompts to help us reflect on current practices in relation to ethics and ethical practice, to develop and polish our ethical sensitivities and capacities.

The report has raised some potential lines of enquiry to explore where EMCC International research policy and practice evolves next. These 10 questions are just some possibilities, and the audiences of this report will create many others, through various and multiple avenues. The 10 questions are summarised below, and each of them represent areas for further research.

Figure 4 Summary of key questions raised in this report

1. How might we develop safe spaces (beyond supervision) to explore live ethical challenges in practice, including those relating to the disclosure of law breaking?
2. How might we open dialogue about making professional judgements about 'ability to perform' as well as the self-care of the coach and mentor?
3. How do we safely know the boundaries of coaching (rather than an alternative pathway such as therapy) whilst retaining a supportive relationship?
4. How do we position ourselves in relation to longer-term and wider effects in a system, especially when these aspects are beyond our immediate awareness and influence?
5. How do we encourage the opening up or widening out of systemic perspectives to enable a greater landscape of awareness in relation to ethical practice?
6. How might we create a global supportive mechanism for ethics which is locally knowledgeable and sensitive?
7. How do we safely integrate our values into sense-making and action-taking to help navigate situations where there are potential ethical tensions?
8. How might we promote promising practices which prompt the surfacing of our hidden values, such as arts-based practices?
9. How might we embed awareness of the complexities of ethics in coach and mentor education and training in a way which promotes generative and interactive development over time?
10. How might we raise awareness of the Global Code of Ethics in the coaching and mentoring communities?

EMCC International recognises the power of co-creation as an approach to 'bridging the gap' between coaching practice and research, and its interest now is to create opportunities and spaces to enable provocative conversations to grow and develop in ways we cannot currently imagine.

As the coaching landscape continues to evolve the intention is to continue the dialogue in order to produce collaborative solutions and new ways of working that support individual coaches and researchers, teams and organisations to deliver effective coaching and mentoring.

There are a number of opportunities for you to get involved:

1. The International Research Conference – our annual event, with a number of exciting development sessions, and sessions dedicated to exploring research in addition to evidence-based and evaluation type activity.

2. LinkedIn sharing and discussion group – here, you can engage in daily, weekly or monthly conversations, both leading up to the conference, and beyond it. We want our LinkedIn communities to grow and be a hub of activity, potentially sharing relevant ideas, research and other activities which stimulate practice. If you have something to share about evaluation, or have questions to ask about it, please feel free to post in this group.

3. Twitter interactions – our ongoing twitter feeds are a rapid channels for daily insights and interactions. Follow us!

4. Volunteer with the EMCC, and consider joining one of our multiple research initiatives – visit our volunteering page to find out about our latest opportunities http://www.emccouncil.org/eu/en/about_emcc/volunteer.

In addition, should you have any other ethical challenges which you want to share to explore further, send a short description to emcc.vp.research@emccouncil.org so we can continue the discussion.

Professor Tony Wall, Rachel Hawley, Dr Ioanna Iordanou,

Zoltán Csigás, Nathalie Lerotic Pavlik, Nigel Cumberland, Alexander Vreede

09 Appendix – survey summary and data

The results of the survey further strengthen the EMCC's intention to raise the awareness of the Global Code of Ethics and to increase confidence and understanding in how a member can/should react to a variety of potential ethical dilemmas, particularly the grey and less clear-cut cases.

Some key points about the data collected:

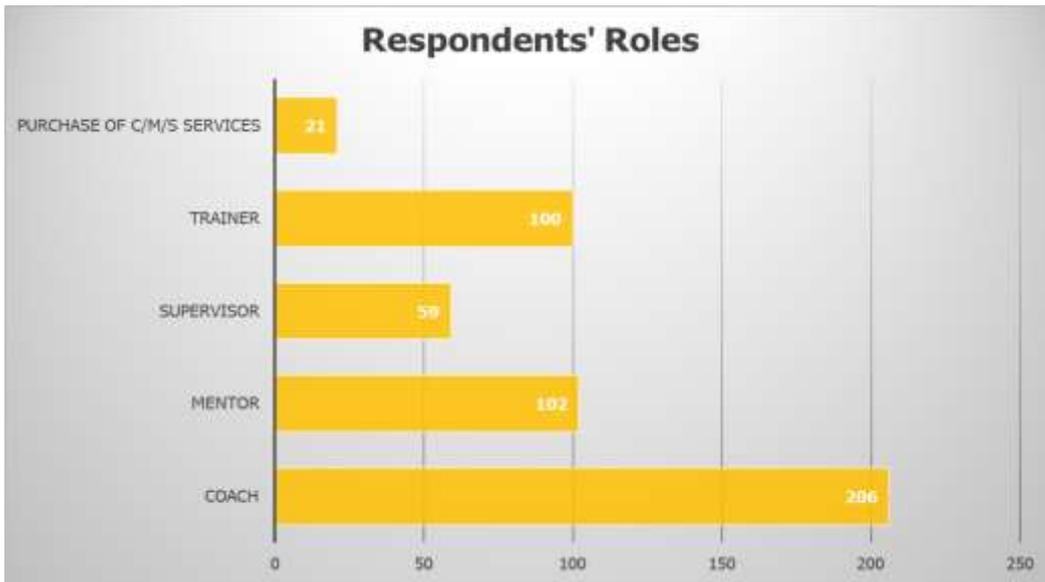
- Respondents represented a broad cross section in terms of their knowledge of, interest in or need to read the Global Code of Ethics (from no knowledge to a more detailed knowledge). This does suggest that in order for ethical awareness to develop further, the Global Code of Ethics need to be further embedded.
- As nearly all respondents gave, sometimes very detailed, responses to the ethical dilemmas, we consider that there is real interest in this topic.
- As most respondents had more than 5 years in practice (with 100 stating they had 10 years or more experience), this does not necessarily cover a cross-section of all practitioners.

The overall responses to the survey invite us to ask the following questions:

1. How could we – as a community – develop our commonalities regarding ethical practice?
2. How could we raise the awareness regarding the Global Code of Ethics in the coaching and mentoring community?
3. How could we further increase the engagement with the topic of ethics and ethical challenge, where it is close to living practice?

This appendix shares the results for each of the items of the survey. Next to the data you will also find a summary of any comments made by the respondents. These summaries reflect the most frequently expressed themes and therefore they are not necessarily representative of the plurality of views.

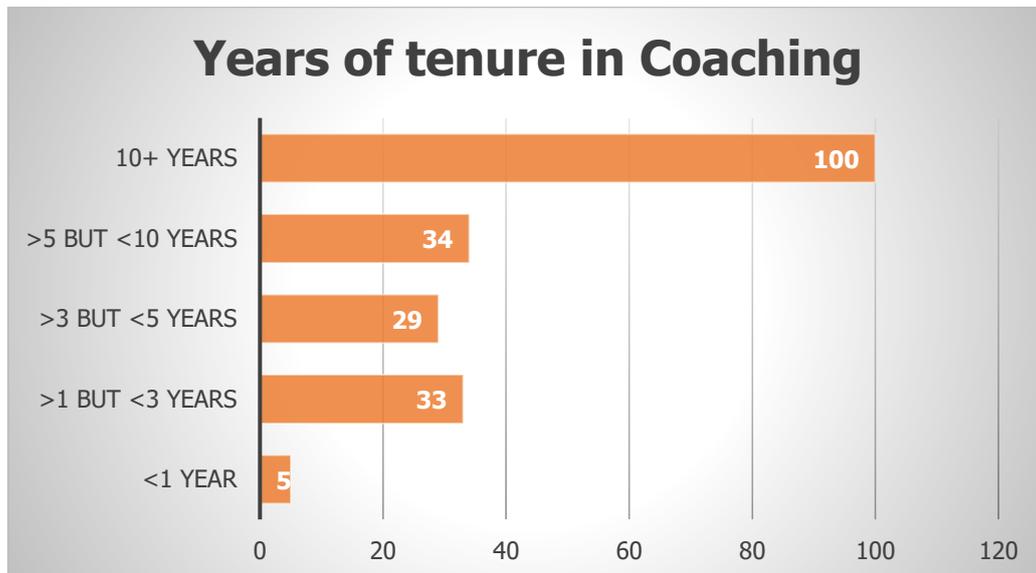
1. Are you a: Coach, Mentor, Supervisor, Trainer, Purchase of Coaching / Mentoring / Supervision services (please choose one or more options)



N= 227, multiple responses given

The results suggest that coaches rarely play only a single role in their professional life. A wider professional portfolio can contribute positively to an individual's life, but may raise concerns from the perspective of ethics. How do the individual professionals handle the (occasionally) different ethical expectations of their roles? Is integration, abiding by stricter rules, or conscious separation of the roles the way forward?

2. How long have you have been working in the coaching field? How long have you have been working in the mentoring field?



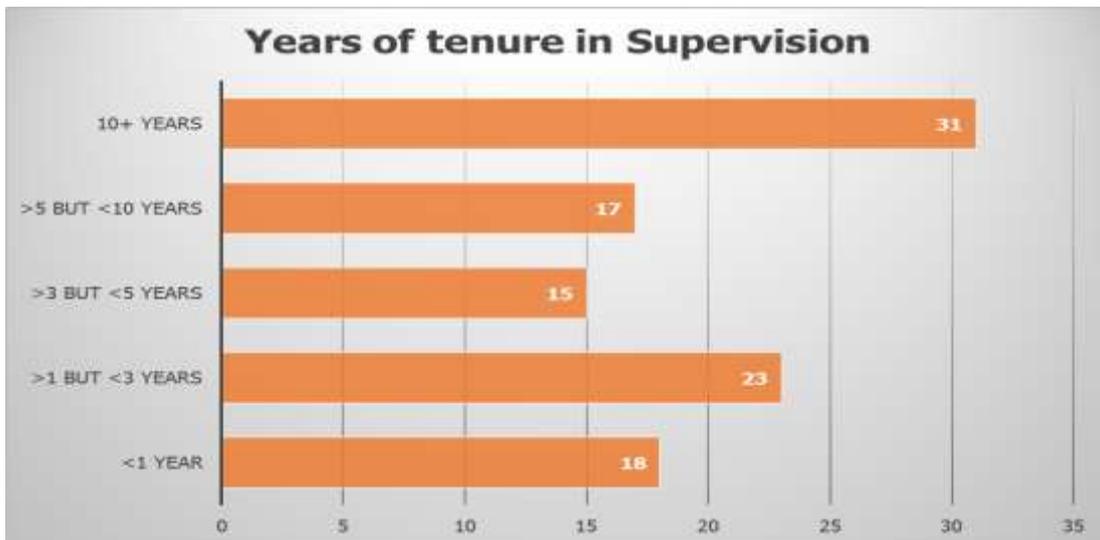
N = 201



N = 137

Coaches and mentors are traditionally the two largest subgroups of EMCC membership. As other studies (such as The State of Play Reports) have indicated a different distribution of tenure in the profession, we might suspect that the topic of the questionnaire has a different relevance to the different groups. Is it possible that ethics becomes a significant topic only after a certain period is spent in the profession? Do professionals need to face such dilemmas to develop a deeper interest in the topic of ethics?

3. How long have you have been working in the supervision field? How long have you have been working in the training field?

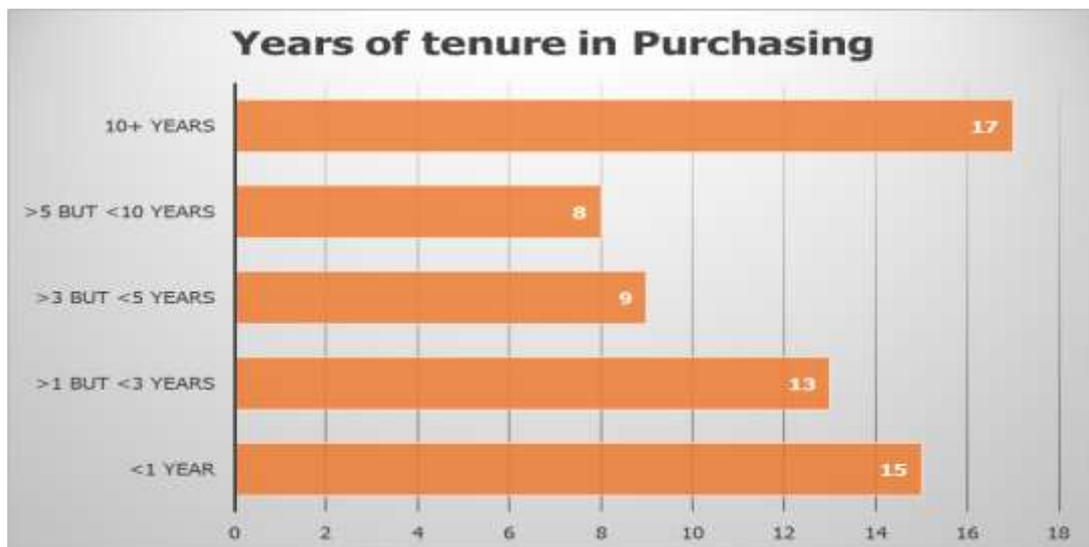


N = 104



N = 158

4. How long have you have been working in the purchasing field?



N = 62

5. What accreditation do you have? (choose all that apply)



N= 227, multiple responses given

It appears that the level, and type of accreditations the respondents had did not really affect their intent to complete the questionnaire. Ethics seems to be a topic to be dealt with at all accreditations levels. Although there was a considerable group of non-accredited participants, their number was significantly smaller than the accredited participants'. We may ask whether it is the effect of the accreditation process that results in a stronger interest in the topic, or do professionals with interest in ethical behaviour have a higher tendency to get accredited?

Summary of comments

- Non EMCC: the majority refer to the ICF and the ILM
- Also mentioned are: PCC (ICF) / CIPD / Psychotherapy / CMI / APECS / PhD / Ashridge Accredited Executive Coach / MSc in Executive Coaching

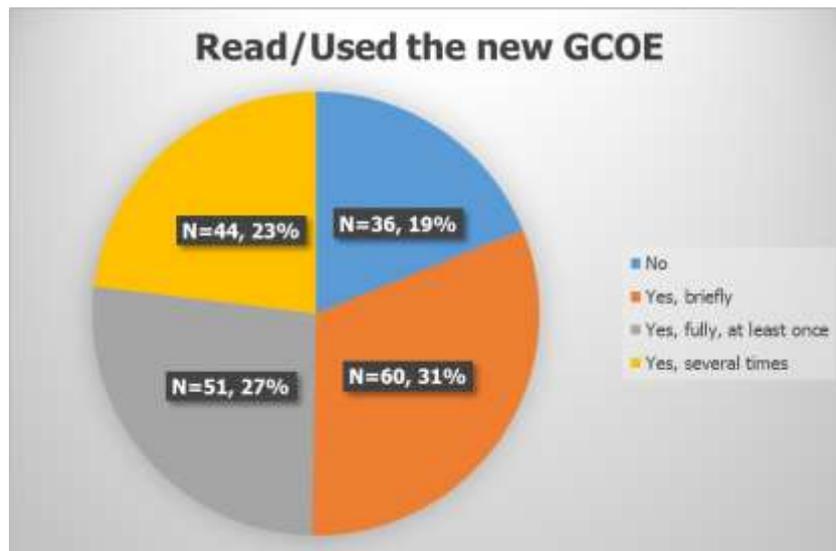
6. Are you aware that the former EMCC Code of Ethics has been replaced by the Global Code of Ethics launched by EMCC and the Association for Coaching (AC) in February 2016?



N = 192

Although 77% say 'yes', the results invite us to consider further ways of raising awareness of the Global Code of Ethics. What else could the signatories do to raise awareness of the Global Code of Ethics?

7. Have you read/used the new Global Code of Ethics?



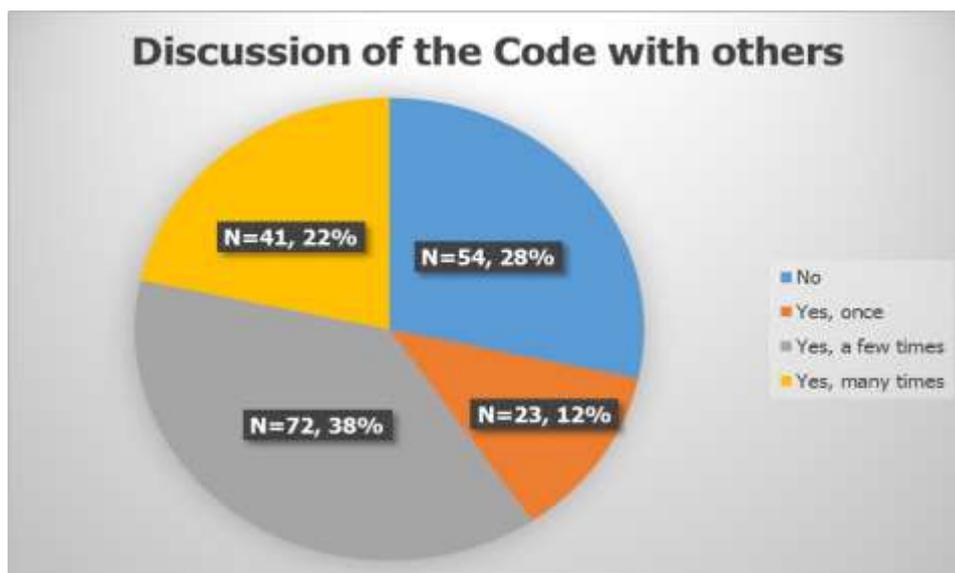
N = 191

The results – unfortunately – do not show a deep engagement with the Global Code of Ethics. What else can international bodies such as the EMCC do to foster this engagement on the level of its members?

Summary of comments

The comments generally referred to the Global Code of Ethics as a useful support in the first step of collaboration, however the wording and the style has been criticized.

8. Have there been situations when you have discussed the content of the Code of Ethics with other people (coachees, mentees, supervisor, client, sponsor etc.)? If yes, please provide details of the situation(s) discussed and with whom in the comments field.



N = 190

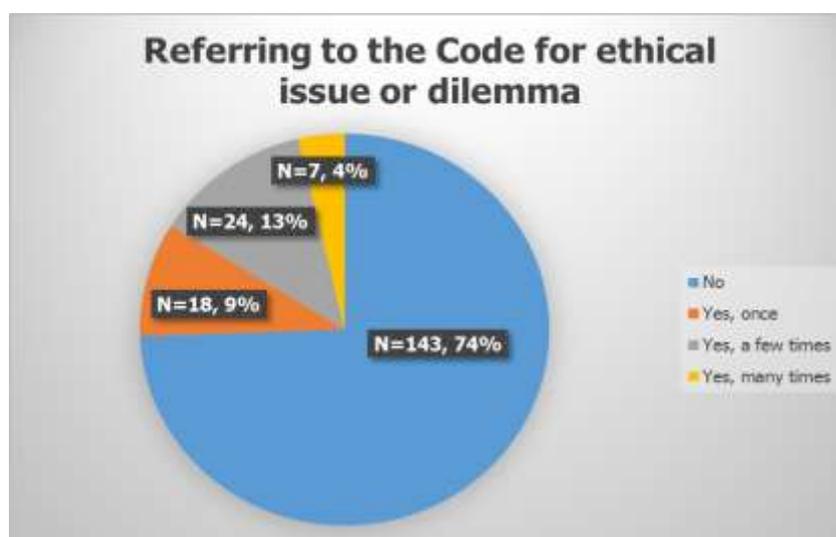
In the light of questions 7 & 8 we would recommend embedding regular discussions with regards to the Global Code of Ethics and related issues within coaching education, training, supervision, and community meetings.

Summary of comments

Out of circa 80 comments, the majority of the discussions were with:

- Coachees/Clients: 40%
- Studies/training: 20%
- Supervision/Community: 20%
- Concerns mentioned included: conflict of interest, dependency, cultural differences, contracting, confidentiality, and boundaries.

9. Have you ever had to refer to the EMCC Code of Ethics (current or past versions) in order to understand its content because you were facing some kind of ethical issue or dilemma? If yes, then please provide details in the comments field.



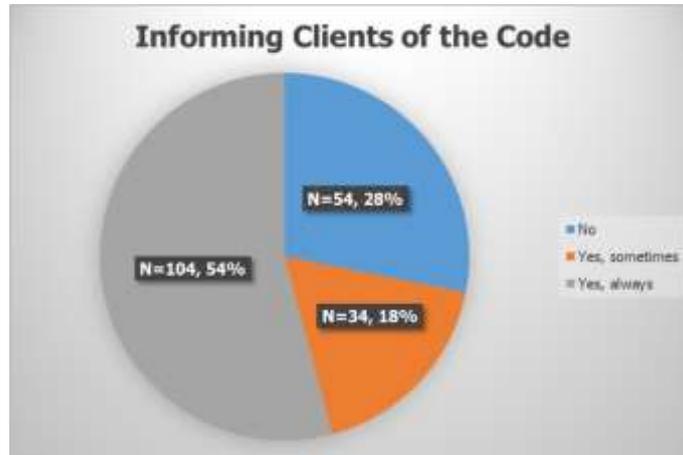
N = 192

This set of data again paints a positive picture. An interesting theme that the comments have shown is that the Global Code of Ethics may be perceived as a rigid set of rules which does not support the exploration of ethical dilemmas. Also the issue of the complexity of statutory and legal requirements faced by globally active coaches was mentioned. Both of these issues could serve as focus points for the future development of the Global Code of Ethics and the activities of the EMCC.

Summary of comments

- Comments made mainly refer to the issues arising while working with clients, and a few referring to contracting, teaching, building own expertise and supervision.
- Reasons for such conflict of interest refer to spouse, radicalization, romantic advances, mental health support, and cooperation with sponsor.

10. Do you inform your clients of the Code? If yes, please add information in the notes field on what do you say? If, sometimes then please let us know when you do and when you don't.



N = 192

Informing coaching clients about the Global Code of Ethics, and in general about the parameters of the coaching engagement, is vital for a professional practice. This is a mandatory action, that all practitioners should follow. How could the EMCC support and foster this practice?

Summary of comments

- From circa 90 comments, nearly 50% referred to informing their clients during the contracting stage and when providing work proposals, and around 15% mentioned referring to it in their materials/emails.
- The majority do not seem to provide comprehensive information to the client, rather a brief mention, link in the documents, or refer only to some aspects (such as confidentiality).

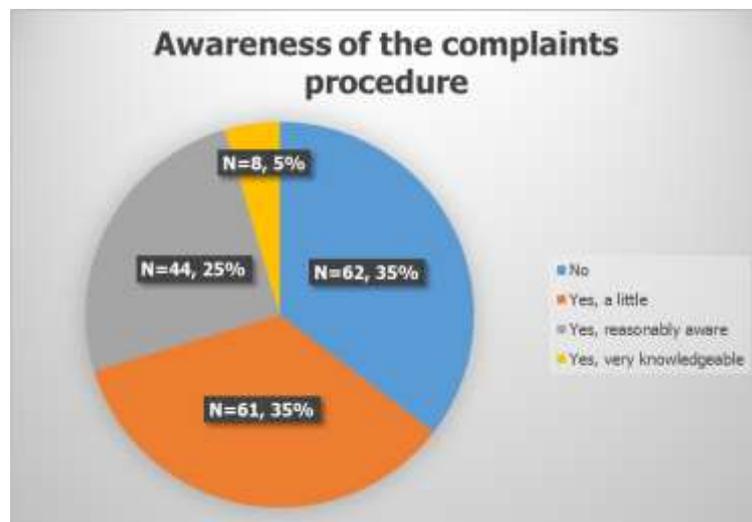
11. Are you aware of the details of the EMCC's complaints procedures?



N = 175

Very few comments were given to this question, and they were mostly critical regarding the procedure in question. Being informed about the procedure could support the professional integrity of practitioners, but the pattern of responses raises questions around the accessibility or transparency of the procedure, which may be enhanced in the long term.

12. Do you inform your clients about the EMCC's complaint procedures? If yes, please add information in the notes field on what do you say? If, sometimes then please let us know when you do and when you don't.



N = 175

Summary of comments

- Out of the 40 comments provided, 40% referred to informing the client during the contracting stage, mostly during a discussion.
- Another 15% inform their clients via a website or sending clients a copy of the code.
- Several respondents mentioned they adhere to organisational procedures.
- A few respondents stated that this question had raised their awareness to inform their clients.

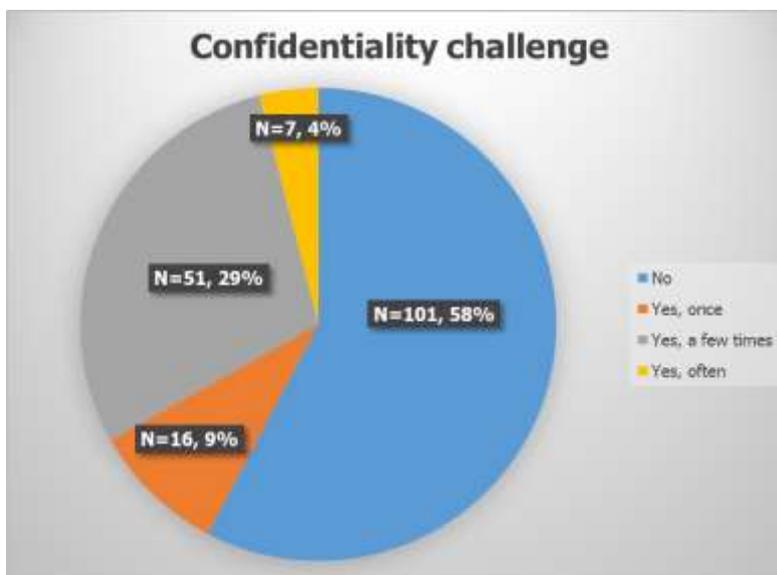
13. Have you ever faced a situation where a client has misunderstood or complained about your terms and conditions and agreed coaching, mentoring or supervision process? If yes, please add details in the comments field.



N = 175

Summary of comments: Very few comments were provided (10), mentioning the need for better contracting, issues around the obligation for results, coach quotation, and referring to a therapist.

14. Have you ever faced a confidentiality challenge? If yes, please add details in the comments field.

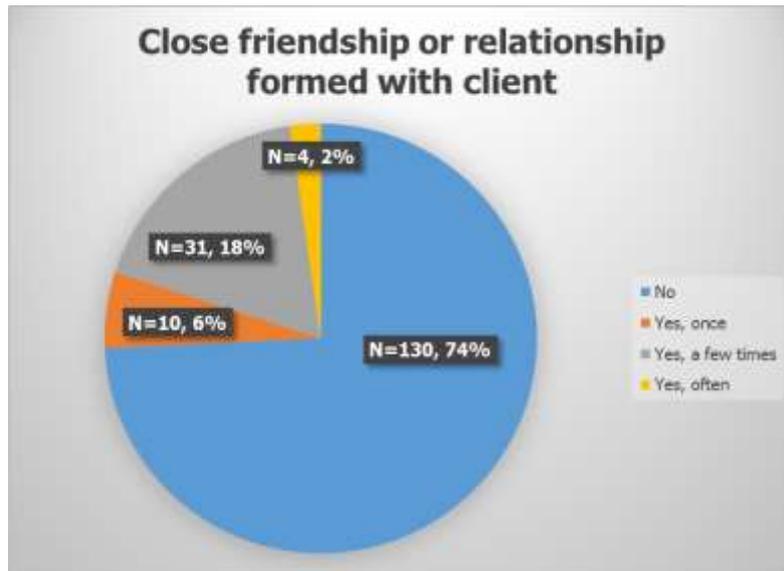


N = 175

Summary of comments

- Out of the 70 comments supplied, several issues emerged:
 - Confidentiality issues with sponsors: 30%
 - Multiple coaches from the same organisation: 13%
 - Illegal and immoral acts: 10%
 - Internal coaching: 7%
- Several comments also referred to mental health matters and supervision.

15. Have you ever become close and/or friends with a client creating friendship or relationship? If yes, please add details in the comments field.

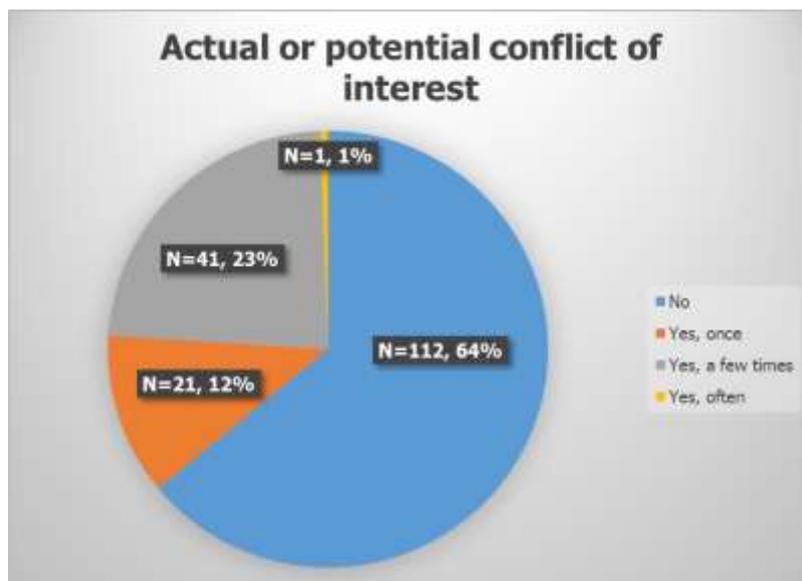


N = 175

Summary of comments:

- Circa 40 comments were given, and the most common were:
 - Remained friends following closure of coaching: 27%
 - Stayed in touch: 13%
 - Had a prior friendship: 8%
- In general, the comments do not indicate that the bonds are very close or intimate, but rather lighter in nature.

16. Has a case of actual or potential conflict of interest ever arisen in your client work? If yes, please add details in the comments field.



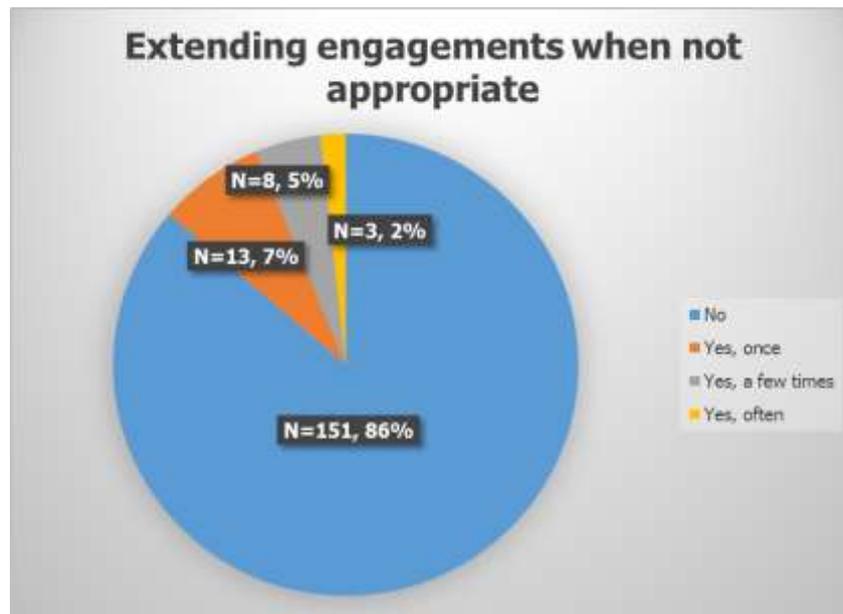
N = 175

It is interesting that a large proportion, i.e. 64% of the respondents, do not believe that a conflict of interest has ever arisen in their practice. Can this be true or might they have been insufficiently aware of such conflicts?

Summary of comments: The most stated matters, from circa 40 comments received, focused on the following:

- Contracting/Sponsors: 33%
- Competing clients from the same industry: 25%
- Coachee leaving the organization: 15%
- Internal coaching: 13%
- Supervision: 13%

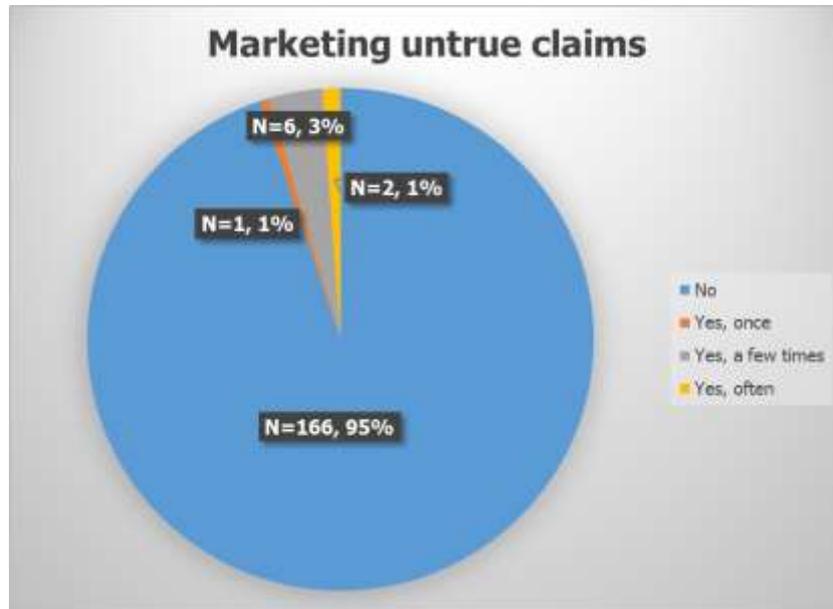
17. Have you ever allowed a supervision, coaching or mentoring engagement to continue or be extended, when you knew that either another form of professional help might be more ideal or that the engagement could have come to end? If yes, please add details in the comments field.



N = 175

Although the results paint a clear picture we think that this sensitive issue could benefit from some further discussion; this issue may be linked to the measurement of the effectiveness of the coaching and mentoring engagements. Please see Wall et al (2017b) for a more detailed analysis of this issue and related ethical issues.

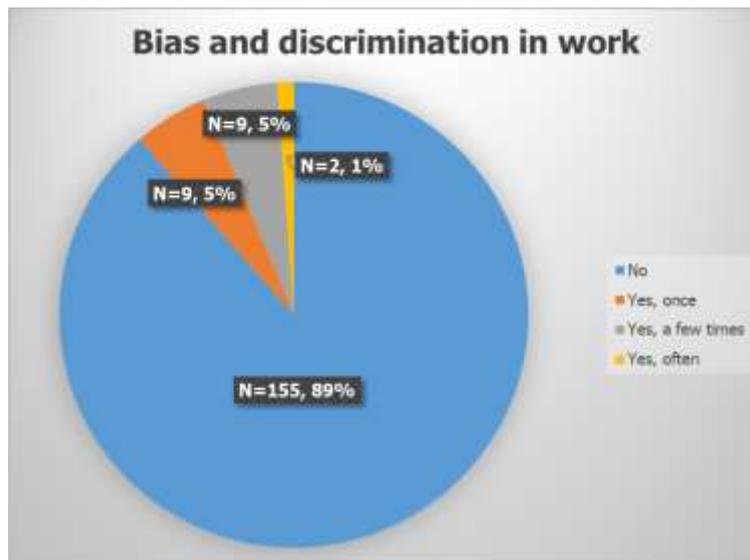
18. When marketing and sharing about your services, have you ever made claims or promises which you knew were not totally correct e.g. exaggerating the benefits or certain outcomes of coaching or mentoring someone? If yes, please add details in the comments field.



N = 175

Although this appears to be a positive result, we question whether it is really true that 95% of us have never claimed/promised aspects of our work which were not totally correct? Do we have blind spots? Again, please see Wall et al (2017b) for a more detailed analysis of this issue and related ethical issues.

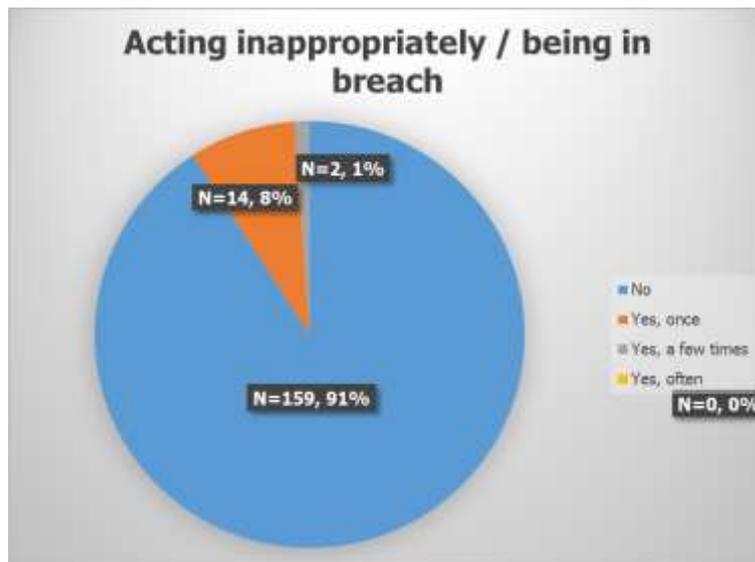
19. Have you ever feared bias or discrimination in your work e.g. choosing to work with or not with a client because of their background, race or sex? If yes, please add details in the comments field.



N = 176

This is perhaps another areas for further exploration. The ethical question surfacing here is whether a coach should or should not work with a client they don't feel comfortable with. There are at least three responses here: (1) one argument is not to coach such a person and find someone else who is better suited for that particular client, (2) a second argument is that not wanting to work with that coachee is a form of discrimination, and (3) a third one is that by not working with such a client we deprive ourselves of an important learning opportunity.

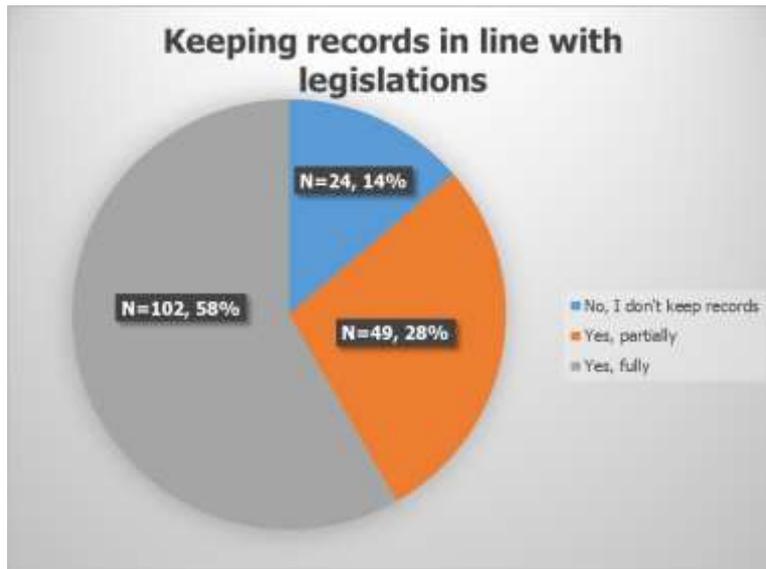
20. Have you ever been involved with a client or other person suggesting that you may have acted inappropriately or in breach of something? If yes, please add details in the comments field.



N = 175

The honesty of those who replied 'yes' must be acknowledged. At the same time, we wonder how many of those who answered 'no' were unaware of any potential breaches, have never faced any situations of this sort, or did not want to reveal this information. A better understanding of the issue of potential conflicts of interest in the Global Code of Ethics and the related complaints processes would seem to be needed. Raising awareness of such potential conflicts has to be an important element of an ethics training.

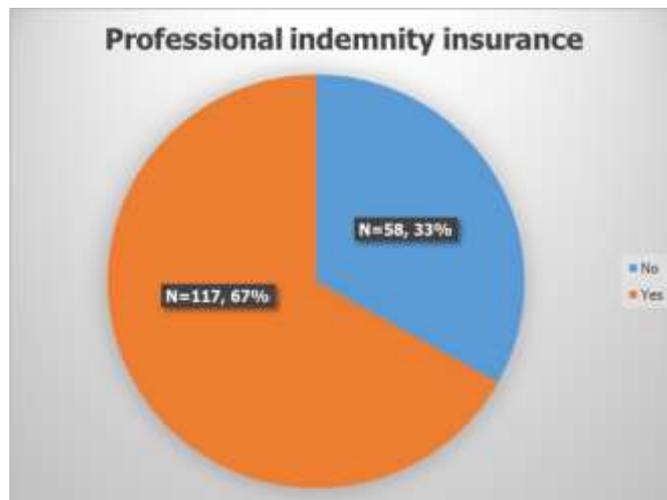
21. Do you keep records of your supervision, coaching or mentoring in ways that are in alignment with your country's laws and regulations on information and data?



N = 176

This is a very important and sensitive area, and one where it is critical that practitioners comply and act in accordance with the respective local laws and regulations. Coaches must be aware that the possibility exists that clients themselves may wish to, and are entitled to, have access to the coach's notes.

22. Do you hold some form of professional indemnity insurance? If no, then please state in the comments field why not.

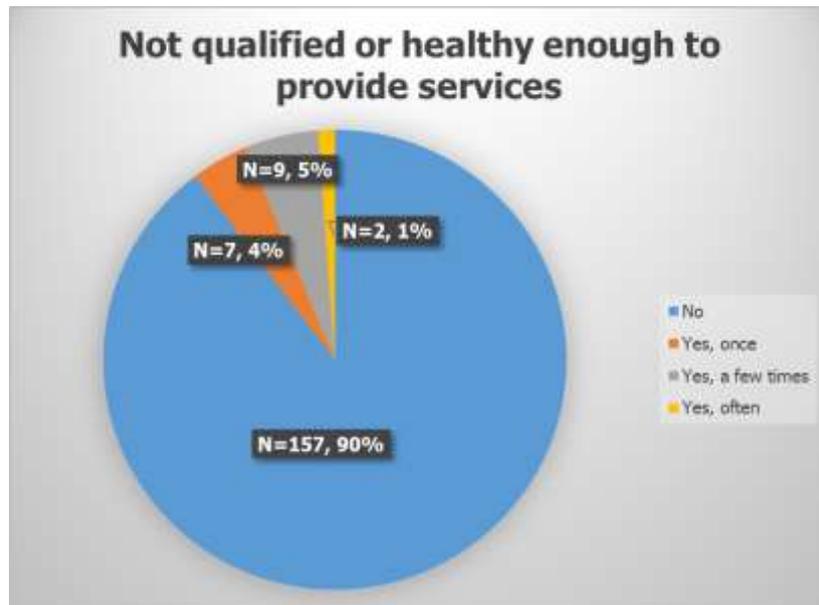


N = 175

Summary of comments: From circa 40 comments, the key responses were:

- Not available in the country of residence: 28%
- Internal coach: 28%
- Unaware of it: 15%

23. Have you ever provided your services when you knew you were not qualified in the situation or not fit and healthy enough? If yes, please use the comments field to give details of the situation.



N = 175

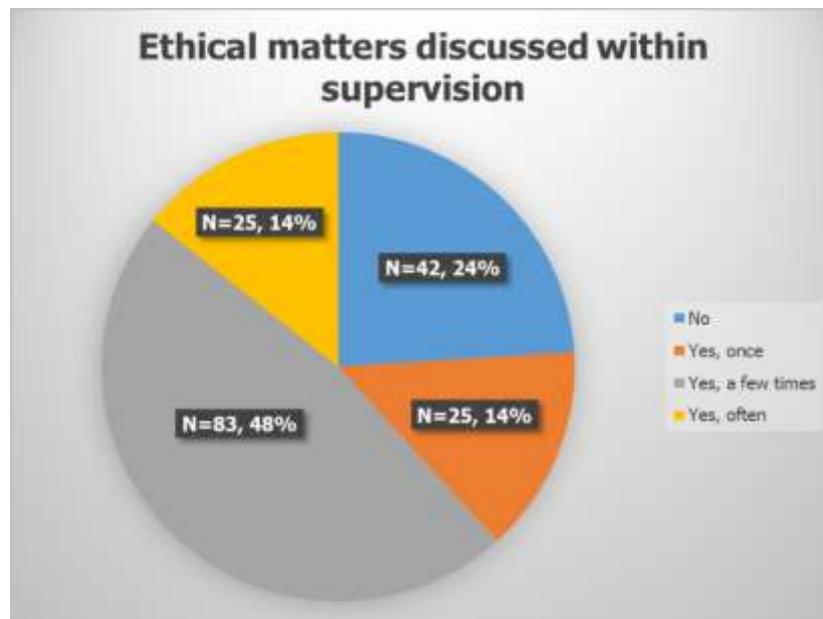
Those who honestly replied 'yes' may reflect on whether or not they were in breach of the Global Code of Ethics, namely sections 4.1 and 4.2 referring to 'ability to perform'. The ethical issue here why these coaches did this, for example, was it because they were unaware, or were they wanting to provide their service to a client who needed them. There is also the issue of the quality of service vs being available even when unfit.

Summary of comments

Out of 20 responses, the main issues stated were:

- Illness: 20%
- Needing rest: 20%
- Not feeling qualified: 15%
- Bereavement: 15%

24. Have you ever discussed actual or potential ethical issues and dilemmas with your supervisor or peer supervision group? If yes, please use the comments field to give details of the ethical issue/dilemma.



24% said they had never referred to their supervisor. Perhaps they are very fortunate to have never faced any type of potential ethical dilemma such as a conflict of interest or ability to perform question. Alternatively, perhaps they were (or still are) unaware of, or avoiding, the need to explore situations of ethical questions and dilemmas.

Summary of comments

This question generated almost 100 comments, with a very wide range of responses. The top reasons referred to included: sponsors, managers of clients, coachees being in a job transition/leaving the company, referred to counselling/therapy, romantic issues, friends, client's spouse, and alcohol.

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