



## **Standard 1 – Case Study**

### **Title: Understanding a Coaching Agreement**

#### **Background**

ICF believes that an ICF Professional should explain and ensure that, prior to or at the initial meeting, the coaching Client(s)/Sponsor(s) understand the nature and potential value of coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement. And it is in the best interest of all involved, that the ICF Professional and Client/Sponsor have a clear understanding of what will be involved in the coaching interactions and expectations.

#### **Case study**

Lakshmi was hired on to coach a team for a small non-profit organization. She had only started coaching their small team 3 months ago and had enjoyed every minute. She had 5 team members who met with her every other week and then once a month she would meet with Darya who was the Executive Director for the non-profit.

Lakshmi had been sure to create an agreement that both Darya and each of the five team members had reviewed and signed. Each of them signed it prior to their first meeting and none of them had approached her with any questions. Because this was a coaching agreement where the non-profit was paying for the coaching sessions, she had ensured to include a lot of information about confidentiality. Before coaching had even begun with the team, she had met with Darya about what she would and would not share with her.

Lakshmi hopped onto Zoom one day and was excited to be working with the non-profit that day. Ava was her first client of the group. When Ava joined the Zoom room, she was clearly distraught. She bravely shared that her elderly father was not doing well and that her family was having the difficult discussion of whether to call hospice or not. Ava and Lakshmi spent the full hour talking through the dynamics of her family and how the relationship with her father had made such a huge impact in her life.

After Lakshmi had met with each team member, it was that time of the month where she would now meet with Darya to go over the team members growth. When it was time to talk about Ava, she mentioned that they had discussed personal items that day, but before that she had seen Ava making headway towards her goals. Darya expressed her surprise that Lakshmi had allowed for personal discussions to interfere with her teams professional coaching. Lakshmi apologized and explained that she hadn't seen it that way since Ava had a lot of personal things going on it could affect her professionally as well.

But Darya was committed to the discussions remaining professional only. This left Lakshmi wondering how she would approach Ava next session. Should she redo the coaching agreement to include this new information from Darya? Should she have met with everyone first to make sure they were all on the same page around expectations?

### Implications for Coaching

- Explain and list all terms of the coaching agreement—the coach should have the coaching agreement on file and ready for the first initial introduction. The coaching agreement should be discussed verbally to make sure both the client and sponsor understand all terms. **ICF Code of Ethics (2020) Section 1, Standard 1 (Coachingfederation.org)**
- Create an agreement that can be modified to meet the needs of a particular client/sponsor and have it signed prior to the commencement of services—the coach should wait for the agreement to be signed and returned before starting a coaching session. **ICF Code of Ethics (2020) Section 1, Standard 2 (Coachingfederation.org)**

### Possible outcomes or next steps

- **Seek outside support.** A coach in any ethical conundrum may choose to turn to their coach, mentor coach, coach supervisor, training program, or coaching organization for support in navigating ethically confusing situations.
- **Be up front with the client.** A coach may choose to bring their concerns to the client/sponsor directly. This allows both parties to discuss and determine the best path forward in a collaborative manner.
- **Be willing.** A coach should be willing to adjust the coaching agreement when something needs to be adjusted.

### Discussion Points

- Should Lakshmi try to encourage Darya to allow for personal development?
- If you were this coach's coach, mentor, or supervisor, how would you support the coach?
- If you were in this situation, how would you move forward without preventing Ava from moving forward?

### Reference

ICF Code of Ethics (2020), <https://coachingfederation.org/ethics/code-of-ethics>