

ICF CONVERGE

OCTOBER 23-25, 2025 • SAN DIEGO



TRUST BEGINS HERE:

CREATING ETHICAL COACHING AGREEMENTS
THAT MATTER

Karl Van Hoey, MCC

Sue McMahon, PCC

Carrie Hopkins-Doubts, PCC

In this presentation...

- You will learn definitions for coaching agreements, contracts, and the difference between them.
- You will learn about the five most essential items to include in your individual coaching contracts in order to create ethical agreements with your clients.
- We will present a case study from the Independent Review Board and discuss the ethical issues involved.

Contracts versus Agreements?



Related ICF CCs and the CoE

3. Establishes and Maintains Agreements

Definition: Partners with the client and relevant stakeholders to create clear agreements about the coaching relationship, process, plans and goals. Establishes agreements for the overall coaching engagement as well as those for each coaching session.

1. Explains what coaching is and is not and describes the process to the client and relevant stakeholders
2. Reaches agreement about what is and is not appropriate in the relationship, what is and is not being offered, and the responsibilities of the client and relevant stakeholders
3. Reaches agreement about the guidelines and specific parameters of the coaching relationship such as logistics, fees, scheduling, duration, termination, confidentiality and inclusion of others
4. Partners with the client and relevant stakeholders to establish an overall coaching plan and goals
5. Partners with the client to determine client-coach compatibility
6. Partners with the client to identify or reconfirm what they want to accomplish in the session
7. Partners with the client to define what the client believes they need to address or resolve to achieve what they want to accomplish in the session
8. Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching engagement or individual session
9. Partners with the client to manage the time and focus of the session
10. Continues coaching in the direction of the client's desired outcome unless the client indicates otherwise
11. Partners with the client to end the coaching relationship in a way that honors the experience

Section 1:

Agreements for Client and/or Sponsor Engagement

As an ICF Professional, I:

- 1.1 Communicate (before coaching begins) with coaching client(s), sponsor(s), and/or other involved parties that the coach is in a direct relationship with to explain the nature of coaching and to co-create a coaching agreement regarding roles, responsibilities, confidentiality, financial arrangements, and other aspects of the coaching engagement.

What is a coaching contract?

It's a **written**, legally binding contract, signed by coach and client, covering all mutual rights, responsibilities, and all needed information about an upcoming coaching program for the client.

Note: All contracts are agreements.

What is a coaching agreement?

It's a **written or verbal** set of agreements for the coaching relationship covering all the mutual rights, responsibilities, and all needed information about an upcoming coaching program for the client. This is more informal, not necessarily legally binding.

Note: Not all agreements are contracts.

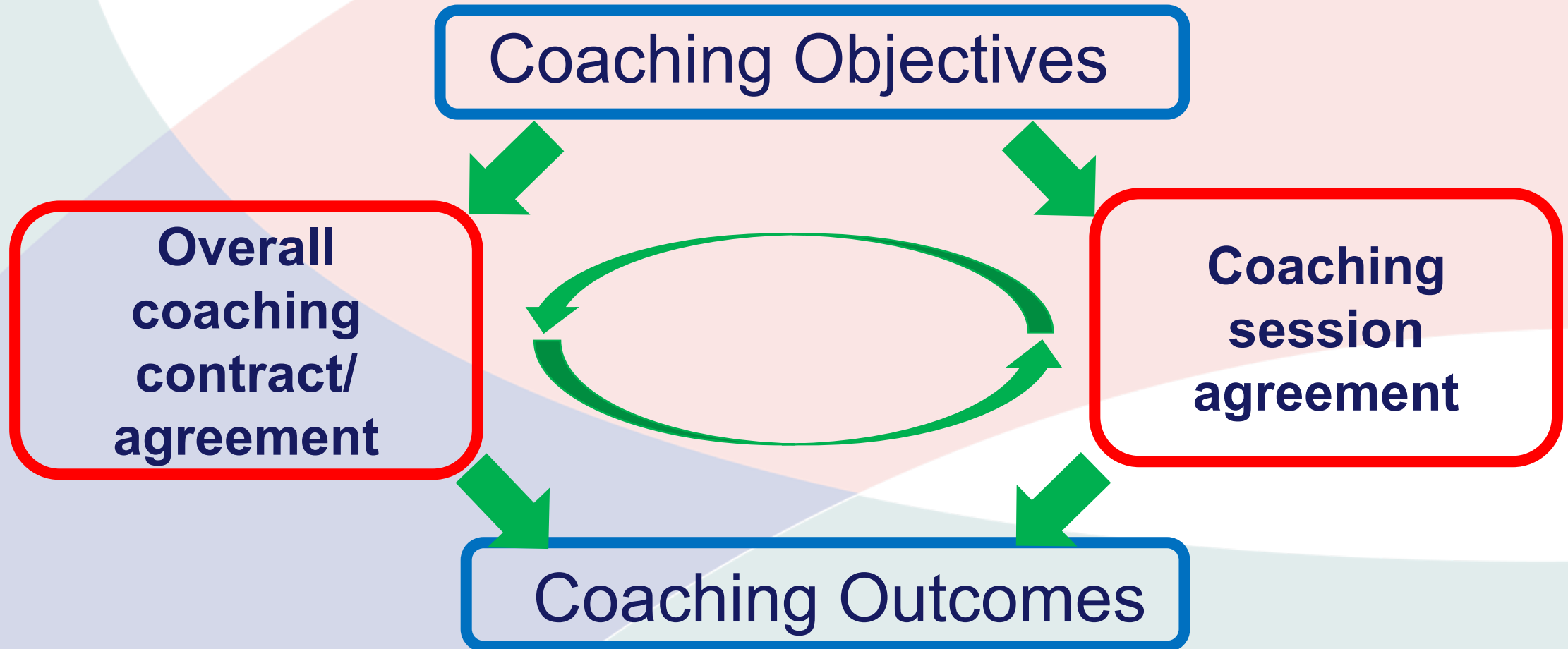
What is a coaching session agreement?

It's a **verbal** agreement between coach and client, made at the beginning of a session, often supported by questions like:

1. *What do you want to explore?*
2. *Where would you like to be at the end of the session?*
3. *How will you know you have arrived there?*

(These are just examples of questions)

How both levels work together and influence each other



Minimum Requirements of an Ethical Coaching Agreement

- ❑ More than paperwork → foundation of trust
- ❑ Clarifies roles & responsibilities
- ❑ Protects confidentiality & client autonomy
- ❑ Provides clarity on logistics & commitments
- ❑ Grounds relationship in ethics & accountability



1. Confidentiality

- ❑ What is confidential
- ❑ Legal exceptions
- ❑ Record-keeping & data security
- ❑ Sponsor reporting
- ❑ Third-party access



CONFIDENTIAL

2. Conflict of Interest

- ❑ Disclose dual roles
- ❑ Manage conflicts openly
- ❑ Referral process if needed
- ❑ Clarify sponsor/client identity



3. Logistics

- ❑ Session length & frequency
- ❑ Scheduling & rescheduling
- ❑ Communication methods
- ❑ Between-session support



4. Termination & Fees / Refunds

- ❑ Payment & refund policies
- ❑ Ending the engagement
- ❑ Referral to other professionals



5. Data Protection & AI Tools

- ❑ Tools & platforms used
- ❑ Data collection & storage
- ❑ Client consent for AI
- ❑ Ethical & professional standards



COMMON MISTAKES WE SEE IN CONTRACTING

- ❑ No written contract/agreement
- ❑ Unclear agreements
- ❑ Incomplete/missing important key elements
- ❑ Insufficient communications leading to misunderstandings by the client
- ❑ Issues with Third-party payees/Platforms/Use of AI tools



**INTO THE
BREACH!**

IRB Case Study

Case Study – Standards Cited

3: Maintain the strictest levels of confidentiality with all parties agreed upon. I am aware of and agree to comply with all applicable laws that pertain to personal data and communications.

20: Identify accurately my coaching qualifications, my level of coaching competency, expertise, experience, training, certifications, and ICF Credentials.

ECR Process

1. Complaint Intake & Staff Review
2. Initial Review
3. Notification to Coach & Request for Response
4. Investigation
5. Final Review & Determination of Outcome/Sanctions
6. Reconsideration (in few cases)

The facts...

- Role witness was an assistant to the Coach, in addition to being a participant in the group. The assistant role was not clearly explained.
- Client was not aware of the exception to confidentiality.
- Coach confirmed that they shared information about the Complainant with the assistant to support their participation in the program.
- Coach confirmed they sent email to program participants about their MCC status and presented themselves as an MCC coach in emails to prospective clients.

Final Review Panel Determination

3: Maintain the strictest levels of confidentiality with all parties agreed upon. I am aware of and agree to comply with all applicable laws that pertain to personal data and communications.

Breach

20: Identify accurately my coaching qualifications, my level of coaching competency, expertise, experience, training, certifications, and ICF Credentials.

Breach

Expected Learning Outcomes

Demonstration understanding and implementation of:

1. Ethical maturity
2. Methods to uphold confidentiality
3. Clear documentation of exceptions to confidentiality in coaching agreements
4. Clear and factual representation of coaching credentials

Ethics Hotline:
+1.859.226.4245



International
Coaching
Federation

coachingfederation.org