BUILDING A KALEIDOSCOPE:
A SUMMIT OUTCOMES PAPER

A document prepared
by

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I. Introduction

The 2012 Future of Coaching Summit began as a series of organization to organization conversations, sharing different perspectives on various aspects of coaching as an emerging field. Association of Coach Training Organizations (ACTO) engaged with International Coach Federation (ICF); Graduate School Alliance for Executive Coaching (GSAEC) engaged with ICF; GSAEC and ACTO had conversations. Out of these, emerged a shared awareness of the increasingly complex global marketplace in which coaching operates and the challenges for coaching as an increasingly fragmented field of practice. It was also recognized that the growing number of coach membership organizations contributing to efforts to create a credible and sustainable field of practice drawing on unique and specialized knowledge and experiences.

As a result of these initial conversations, GSAEC, ICF and ACTO collaborated to extend an invitation to our colleague organizations to join in a more global conversation about coach preparation and practice. The Summit Planning Committee sought to provide an opportunity for all of the voices at the coaching table to exchange ideas and gain a better understanding of each other and our field. The Summit was organized by a steering committee consisting of two representatives from each of the original organizations, and representatives from the European Mentoring and Coaching Council (EMCC) and the Australian Psychological Society’s Coaching Psychology Special Interest Group (APS). Invitations were sent to organizations identified as non-profit coach membership organizations globally. The stated purpose of the Summit was as follows:

“To be a catalyst for engaging Professional Organizations, individuals and other Stakeholders in collaborative dialogue on the future of coaching: preparation of coaching and their credentialing.”

The focus was selected based on a recognition of changing market forces and concerns about the credibility of the field and quality assurance. The committee also believed that a specific focus would serve as a starting point for the emergent, Appreciative Inquiry (AI) process. In preparation for the Summit, a background document was prepared by Francine Campone and Mark Ruth; which presented, in summary form, the core coaching competencies as constructed by several of the participating organizations.

Over a two-day Summit in July 2012, twenty-nine participants; representing 14 professional organizations and five countries, engaged in a facilitated AI process (see Appendix A). Six graduate students and alumni from the McCell School of Business at Queens University of Charlotte volunteered to serve as recorders and documenters of the Summit content and process. The notes and background documents were consolidated and this outcomes paper produced. The two-day dialogue engaged all of the participants and generated a considerable quantity of documentation. Given the fluidity of the agenda -particularly on Day Two- the changing configurations and reconfigurations of group membership, and the quantity and diversity of documentation, material from each day was organized thematically with representative statements for each theme as documented in the recorded notes. The key
concepts emerging in each day’s dialogue were captured and concluded with suggestions for conceptualizing the work served as a frame for a continuing action learning process.

This paper was generated based on the presentation documents and notes taken by the volunteer recorders and individual participants who shared them with the author.
II. Day One: Discover and Dream

Processes

The facilitators, Jane Watkins and Ralph Kelly, welcomed the participants and offered an overview of Ed Nichols’ theory of three cultural orientations: person/object, person/person and person/group. They followed with an overview of the Appreciative Inquiry process they would use:

- Discover-defining the scope/intent of the work and identifying the best of what is
- Dream-what we can do to make it even better
- Design-how we are going to do it
- Deliver-how we are going to do it when we go home to continue making it better

Following the introductions, participants were asked to form groups of four and share stories of their “best experiences with/of coaching.” As participants shared, members of the group were asked to jot down ideas, concepts and insights from the stories. These were listed on chart paper with a focus on the high points, exciting ideas, examples and insights. After further discussion in groups of the listed points, groups were asked to create a visual of ideal coach preparation and credentialing and to put that image into words to create a provocative proposition. Each group reported out a provocative proposition, identified in the day’s outcomes section below.

After a lunch break, participants changed groups and were asked to review the presentations and chart three elements they heard repeated in the reporting out. These were again reported by the groups and flip charts posted in the front of the room. Each participant was then asked to select three key themes or issues. The final session of the day began with an invitation for groups to consider three questions:

- How do we lead to create a greater good in a socially responsible way, rather than just facilitating the client’s agenda?
- What is being called for in the field of coaching as a system?
- What is the dream around that?

Outcomes

At the end of the first activity, there was considerable consistency in what triads presented as the elements of effective coaching. These elements, reflected in many group presentations included: wisdom; coach preparation; commitment to excellence; respectful relationships; inclusive; culturally attuned; openness and flexibility; curiosity; belief in human potential for change; collaboration; partnership; in the moment; going deep/surfacing the “real” issue; trust; context (person, culture, organization, relationships); exploration; awareness of energy, perspective, now; suspending judgment; staying alive to what unfolds; self-management;
mutual agreement; open to ambiguity; centrality of client’s story; noticing patterns and intuition. Other elements include: mentoring/supervision/consultation; assessment; multiple roles/different hats;

The individual group dialogues, reporting out, and larger group exchanges provided a very rich set of ideas, perspectives, possibilities, and the seeds for growth and evolution of the field. The provocative propositions for coach preparation reported by each of the groups at the conclusion of the morning sessions served as a starting point for the emerging themes identified at the end of the day.

**Provocative Propositions**

- Coaching profession yields skills for the world. There is tension between coaching as a profession and letting coaching skills become a virus and get out there.
- One connected world bridging past practices and innovation.
- Positive risk, ‘co-opetition,’ interdisciplinary, now
- Most people can coach some people sometime in some situations; not everyone can coach everyone in all situations. Coach selection, supported development and competence continuously grow alongside client need and complexity.
- Catalyzing the catalysts of transformation...with the exception that the catalyst is also transformed.
- Coaches who are fluent in the creative tension of emerging conversations.
- We declare that the coaching industry is viable and sustainable because coaches are educated, trained and experienced in both coaching expertise and domain expertise. All coaches share a common core of coaching expertise in eliciting human change, growth and potential. Each (coaching) domain has its own unique combination of prior and new knowledge, skills, experience and credential.

Notes from the group discussions and presentations throughout the day; leading up to a final overall session, showed some overlap and complementary items. To provide a structure to these materials, results were grouped thematically.

These themes do not represent separate issues but are interdependent elements of an emerging systemic view of the coaching field. These themes were identified by reviewing all of the notes and other documentation of the meeting, capturing recurring words and phrases, and grouping related ideas as a way of presenting the outcomes of the first day of the Summit, the discoveries and dreams. Each theme is followed by representative statements made by individuals or dialogic exchanges within a group. The representative statements appear verbatim as they were recording on the presentation posters or as they appeared in the session recorder notes.
An ethos of connection was present throughout these discussions. The **five themes** identified were: Sustainability; Complexity; Responsibility; Continuous Learning; and, Uncertainty/Ambiguity.

**Theme One: Sustainability** - World sustainability (particularly concerning the environmental); of coaching as a credible, contributing field of practice; of the individuals and organizations we support with our coaching; of the impact of coaching work.

(Note: Items appearing in quotations are cited directly from the documents; any non-quoted items are paraphrases of longer or repeated statements on those documents).

“Concept of sustainability—mountain, ocean, tributaries, damage to environment...when budgets are cut, sustainability disappears. Sustainability of coaching”

Sustainability of world and coaching depends on connection, understanding the world, our place and our system of systems

“Making the world a better place...what is our (coaching leaders) small contribution—to fix this?”

Are we contributing to a sustainable world or are we training to destroy the world?

**Theme Two: Complexity** - Contextual complexity including cultural awareness and sensitivity; multiplicity of coaching sectors; multiplicity of coaching knowledge bases and conceptual frameworks; diversity of coaches and coach expertise; complexity of marketplace and consumer demands; complex and conflicting goals in coaching engagements.

“I approach (clients) with whether they are in the right job, how to change the way people interact with each other. How an organization interacts with the organization, constituents, regulatory bodies, Boards of Directors, etc.”

“Conflicts arise between different organizations vs. individual clients. Goal oriented work vs. developmental work.”

Boundaries of competence: supervision-safety; vary by complexity (i.e. different competencies required different situations); not all coaching needs rocket science

Propose a two-dimensional process-competence and complexity. Coach selection and development should match client’s complexity. A complexity model of coach preparation and development was presented representing recursive interplay of client need and context, supervisory and support systems, system boundaries and the boundaries of coach competence.

The global context is also the context for the field of coaching-multicultural. The global world of coaching has many different forms of knowledge—what people need to know theoretically,
conceptually, behaviorally. Also dimensions of the person becoming the catalyst. The neural networks are knowledge, what processes go into the preparation to allow internal integration.

Market is demanding multiple, integrated services using domain expertise.

Theme Three: Responsibility - The purposes and goals of coaching; of practitioners to their clients, to the field, to each other and to standards of professional practice.

Contribute to the sustainability of the world-our thinking self, our feeling self, reservoir of experience meeting the client in the moment.

Excellence is being the best, standing on the shoulders of giants, collaboration, mentorship, consultation, evolution, what can become infinite potential, excellence of striving.

Driving the change-market place, protecting the client, skepticism-impact-what does it do

In addition to building bridges, we must avoid creating walls...we must work together.

Coaching engenders insight, which generates change and transformation, unlocking the doors to insight, a global perspective and growing networks.

Theme Four: Continuous Learning - The role of mentoring, supervision, on-going professional development; reflective learning from experience; learning from the dynamic tensions in the field and in individual engagements; learning as emergent process.

“Attributes and abilities are not necessarily what can be trained, so really talking about selection and support.....there’s a piece of affective, additive, world view, then there’s tools and techniques, model frameworks.”

Interventions based on understanding of theory

A developmental process, a journey

(Coach) qualities: resilience, use of data, ambiguity, courage, confidence, humility

“Preparation means attitudes, tools, and methods”

“A recursive process...may require some letting go of what you know”

“As we train professional coaches it has to include the emerging part of skills-coaching as a way of being.”

Picasso: ‘if you want to break the rules-you need to learn all the rules.’ Danger becomes when we go in thinking we can be a Picasso without a solid foundation.
The leopard’s redundancy…allows it to move into different environments. We need to prepare coaches with redundancy to succeed.

Doesn’t mean everyone needs complex skills to do all coaching….model like a physician –start out, and then specialize along the way with supervision, etc.?

There are many populations that don’t resonate with the paradigms we hold, they can be barriers.

Theme Five: Uncertainty/Ambiguity - Lack of clarity concerning the vocabulary of coaching; the coach identity; coaching as a skill, profession, industry or way of being; ambiguity about the coaching process.

“It’s fascinating that coaching means so many things.”

(Regarding: defining competencies) “We pretend they don’t exist, just like the definitions of coaching. No one accepts anyone else’s definitions. Part of the model that gets into qualities feels squishy to people.”

Is this an industry? What do we have control over but is influencing us? Is this a profession? Also faced with dramatic, dynamic industry changes….Markets will make decisions with our without people.

“How much tolerance/respect is there for different coaching styles? What’s the range the group sees as OK to call coaching?”

“We danced up and ran from: a skill or a way of being-a profession or something people do in everyday life.”

“In an age of paradigm shift, we need to see business and how we do business very differently.”

Distinction of professional coaches vs. coaches-analogous to physicians vs. healers?

What is our role as an industry and as a profession in addressing then world’s challenges?

Building new neural networks-finding words for things that don’t have words

Create something new-interdisciplinary

The concept of the professional coach; as opposed to the concept of ‘coaching’ occurring across a continuum in the world. If this is something that can happen, how and whether preparation and certification feeds that.

How to define coaching in a way that is simultaneously structured enough to convey meaning yet flexible enough to be responsive?

Is identity something that is claimed or a skill used?
The role and place of pro bono coaching, coaching in the nonprofit sector, coaching the global village

The roles that social responsibility and/or social justice plays within coaching conversations.

End of Day One: Twenty-One Key Concepts

At the end of the day, participants were asked to identify the key concepts that emerged from the day’s discussions and presentations.

- Quality of connections: between the world and the world of coaching—understanding, place and system within system
- Role of stories in meaning-making—potential and costs
- Defining coaching in a way that is structured enough to convey meaning and flexible enough to be emergent
- Skills vs. professional role vs. profession—tension and priority
- Respond to demand for multiple services using domain expertise
- What is the shared kernel among all coaches globally
- How do we lead to create a greater good, in a socially responsible way, rather than just facilitating the client’s agenda?
- Complexity/situational coaching
- On-going preppingness (sic) /lifelong learning
- Global/social community sustainability
- Profession and identity
- There is a magic of transformation
- Coordinated system to move coaching forward
- Elements to consider around credentialing and coach preparation for global coaching
  - Continued professional development (e.g. self-awareness, etc.)
  - Balance of art and science
  - Balancing context with coach and client needs
    - Subject matter expert vs. rhetorical/inquiry
    - Velocity (incremental vs. transformative)
    - Global sensitivity
III. Day Two: Design and Deliver

Participants reconfigured into **five groups** to continue conversations on the top themes from the preceding day. The key observations recorded in each group discussion, along with the group’s report out to the whole are listed below. After the morning report out, participants reconfigured and discussion continued.

**Group 1: Global and Social Community**

- Need for awareness of our own biases and a truly global perspective of the coaching field: “integrate the west with the best of the rest”
- Need to affect a shift in coaching and corporate cultures and values-away from profit-centered to social responsibility
- A Venn diagram view of coaching- a global, socially responsible credential coach comprises ethical guidelines; education/training; on-going preparation and supervision; best practices. Ethical guidelines address social responsibilities; global perspectives; influence right doing/conduct. On-going supervision includes supervision when coaching cross-culturally; coach exchange. Best practices include advocacy; strategic collaboration; global coaching research; building others’ coaching capacity; partnership to build credibility and influence of coaching.
- Proposition: Build the capacity for coaching as a way of life-i.e. relationship and conversation, in the world population. Coaches are global citizens who are socially responsible in everything they do:
  - We practice under ethical guidelines that include social responsibility
  - We include social responsibility as a dimension of the coaching engagement
  - We advocate for social responsibility
  - We collaborate with movers and shakers (including media) who can influence our planet and the triple bottom line (people, environment and financial sustainability) and the perception of coaching
  - We partner with NGOs and non-profits on a global basis
  - We build a coaching capacity in the world citizenry
  - We form an overarching council of organizations that drives this agenda

**Group 2: Definition of “Coaching”**

- A core definition that is global, systemic, sufficient to convey meaning and flexible enough to respond to different and emerging contexts
- Proposed definition: Coaching is an informed (by skills, ethics, standards, theories, and models) practice in which coaches collaborate with client(s) in dialogue (co-created) about the client (individual context) and the environment in which they are embedded and co-create reflective learning experiences that support individual and collective change.
Group 3: Professional Development – The Role of the Market

- Each coaching domain has its own unique requirements and standards. Each domain has its own unique combination of prior and new knowledge, skills, experience and credentials.
- Coaches need to understand each domain’s goals, what people in organizations need with a spirit of inquiry
- Need to explore in order to determine the core foundations needed
- The market place wants results, requires domain expertise and change expertise
- Training and credentialing to specific domains improves the credibility of coaching; leads toward greater good and social responsibility; contributes to sustainability; supports a definition of coaching which is both structured and emergent
- Proposed specialization domains: leadership, health and wellness. Invite input from market re: desires for specializations, collaborate with domain experts, develop standard process for building credibility/credential.
- Proposition: We declare: the coaching industry is viable and sustainable because coaches are educated, trained and possess expertise in both coaching and specific domains. All coaches share a common core of coaching expertise in enlisting human change, growth and potential.

Group 4: Coach Preparation and Education

- Master’s level education can provide a core-critical thinking.
- Core education-critical thinking, deep knowledge base in competencies, practice; grounding in assessment- knowledge of instruments, understanding validity and grounding in research; core content areas for each coaching domain; ethics; knowledge of adult development, behavior change, motivation, human learning, group dynamics, use of self, self-awareness
- Framework: core foundations; master’s level (or equivalent); core competencies (listening, questioning, reframing…..); grounding in assessment; basic understanding of research-methodology and as consumer; core content areas-ethics, group dynamics, adult development, behavioral change, motivation, adult learning

Group 5: A Coordinated System for Moving Coaching Forward as a Whole

It was observed that Group 5 had, by far, the largest number of participants. The group chose to break into three subgroups: (1) what the vision might look like; (2) possible barriers and enablers and the regrouped as a whole; (3) what the indicators of such a system might be. Key outcomes from small and large group documents are indicated.
Group 5 – (Subgroup 1): Vision & Strategies

- A respectful, inclusive process, high quality training, credentialing
- Collaboratively sharing knowledge, support, abundance
- Council of members from all coaching groups
- Agreement on common language, ethics
- Opportunity to move forward is structural
- Possible benefits: Greater clarity to end users of what coaching is and its outcomes; more alignment among professional bodies; aligning consumer and professional expectations
- Respect the system that is created (creditability and competence); globally recognized professional identity; world-wide survey to generate input for users of the world; crowd sourcing; easy, accessible, clear and flowing process; surveying what key contributors are doing
- Global system for leveraging professional association resources for capturing input re: client needs, wants, requirements and desired outcomes; disseminating clients input and association best practices; clear process steps for making this happen across associations.
- A simplified process to locate coach training and education; certification/credentialing information; understanding of the various associations
- A system to continue building trust, relationships and communication between and among the coaching organizations; joint statement of ethical conduct and practice; system of collaboration on coach-specific research
- Self-managed website as a basis for people to go for collaboration; use technology to build a physical representation of the exchange

Group 5 – (Subgroup 2): Barriers and Enablers

- Limited by our own perspectives...we don’t know what we don’t know or who’s out there
- Organizational buyers of coaching are confused
- The present is a system but a chaotic one- everyone doing their own thing from their own perspective (academic, individual)
- Self-interest (proud of our work, holding on a bit too much); “not invented here” thinking
- Lack of awareness, information about representative organizations-coaches, suppliers, purchasers
- Enablers are structural, actionable; barriers are intangibles-political and other
- Lack of shared definitions
- Basis for testing domain expertise-need job analysis for each domain
Group 5 – (Subgroup 3): Indicators of Success

- Creating strategic appropriate alliances and relationship building
- Global coaching forum for exchange of ideas in informal dialogue
- Continuing discussion for more clarity
- Understanding and learning about the different groups-overlaps, similarities, distinctions; understanding differing perspectives
- Collaboration across groups
- Evidence of action and outcomes
- Global coaching forum not new oversight organizations
- Agreed upon ground rules for working together

**Directional Statement for Moving Forward:** Creating Appropriate Strategic Alliances – Global Forum of Professional Coaching Bodies (Current State) – How to continue the dialogue that would provide clarity on the market for coach education and credentialing amongst professional coaching bodies?

1. **Longer Term** - Current State Analysis Strategic Priorities of Various Professional Coaching Bodies;
2. **Shorter Term** - Core of Ethical and Professional Standards (Using APS – Code of Ethics using public documents) and Definition of Coaching;
3. **Identify Stable Core/Commonality;** and

**Proposition 1:** We have a respectful, inclusive process of on-going collaboration and communication amongst professional coaching bodies focused on high-quality coach education and training in the areas of:

- a) Code of ethics and professional conduct;
- b) Credentialing and accreditation schemes; and
- c) Components of body of knowledge, competencies, process, research, coach supervision.

**Proposition 2:** We propose inviting the bodies attending the “2012 Future of Coaching Summit” (and others who met the criteria for this forum) to continue a collaborative dialogue and develop:

- a) A mutually acceptable common definition of coaching; and
- b) A common core of ethical standards for their members-in service of providing more market clarity.
End of Day Two: Future Commitments from the Room

The second day session ended with individuals representing the participating coach organizations making offers, promises and/or commitments. All of the participating organizations committed to sharing the results of the Summit with their respective organizations. Several requested continuing conversations with organizations sharing similar focus or interests. Participants committed to continuing communications on various topics including lessons learned from their experiences in credentialing development and sharing other areas of expertise. Several participants expressed interest in continuing the dialogues via on-line forums and suggested a follow up conference.
IV. Summary Observations and Recommendations

When I am confronted by a large, complex set of data, I sometimes find it helpful to find a metaphor that serves as a framework for organizing and making sense of the material. In working with the volumes of notes and the material contained therein, I was reminded of a kaleidoscope.

A kaleidoscope is simultaneously simple and complex. Variously shaped bits of colored glass are contained between two clear glass elements: loosely enough that they move and rearrange as the tube is twisted yet sealed in to avoid losing the design elements. As the tube is turned, the pieces arrange themselves into a design which is then reflected in angled mirrors lining the viewing tube. Together, these elements form a complex unified design.

It strikes me that what we are seeking to collaboratively articulate is the color and shape of the design elements (e.g. practice domains, core skills and knowledge, standards of practice) as well as defining the parameters of the enclosing framework (e.g. a core definition of coaching, opportunities and resources of the diverse coach organizations, consistency in the marketplace). These outcomes notes offer rich material for continuing conversation and dialogue for purposes of clarifying and gaining a shared understanding of the fundamental pieces of coaching which can then be rearranged and reflected in infinitely varied ways while remaining essentially intact.

The Future of Coaching Summit was conceived of as an action learning process- bringing the different sectors of the coaching field together to assemble a whole picture, to share perspectives on the field, on practice, on role and identity, on core principles, beliefs, values and to start to consider both the central light source and the frames/boundaries Dialogue in Bohemian sense is the beginning of an action learning process- exchanging views, listening and internalizing/synthesizing the shared wisdom to collectively co-construct a framework of increasing complexity

The concluding session of the Summit gave participants an opportunity to put forward offers, promises and commitments to keep the dialogue going. The recent agreement between ICF, AC and EMCC on a code of coaching ethics is one point around which participants will build ongoing dialogue. Organization representatives offered to build platforms for dialogue, schedule follow up conversations, arrange meetings. I would also propose that the initial document and this follow up document be put together in a publication to be made available through the representative organizations and that organizations have a forum for posting and sharing responses and any organizational documents that emerge in response.
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V. Appendix A: List of Summit participants

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**Association for Coaching (AC)**
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**Association of Coach Training Organizations (ACTO)**
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Virginia Kellogg

**American Society for Training & Development (ASTD)**
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**Australian Psychological Society (APS)**
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**Center for Credentialing & Education (CCE)**
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**Coaches and Mentors of South Africa (COMENSA)**
Matt Shelley

**Graduate School Alliance for Executive Coaching (GSAEC)**
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Terry Maltbia, Ed.D.
Linda Page, Ph.D.

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Natalie Tucker Miller

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Pat Matthews
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International Consortium of Coaching in Organizations (ICCO)
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