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Helping independent coaches develop their coaching business: – a holistic approach to supervision or an opportunity for supervisors to exploit their position?

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Abstract:

This piece reflects a conversation between two supervisors who discovered the scope of supervision support they offer clients was remarkably similar, despite quite different backgrounds. Of particular interest to them was how they managed the support connected to the more commercial issues that supervisees brought. In this article they articulate how they include this element within their supervision work. They consider the appropriateness of this and the ethical issues that it may raise. They ask whether this activity fits within the accepted “functions” of supervision as documented in the literature (for example: formative, normative, restorative – by Proctor 1988)? Or does it point to a fourth “function” of supervision in the world of independent coaches – and if it does, what would it be called?

Value/Originality:

An unspoken, or possibly even ‘assumed’ function of supervision, is candidly considered by two Coaching Supervisors: creating an opportunity for the practice of supervision to be further informed and established as an integral part of professional practice

Key Words:

Coaching supervision, business development, function

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Introduction

As two experienced supervisors we discovered that both of us will support our supervisees on matters which relate to the commercial elements of their coaching practice as well as directly client related issues. Questions like – how do I get more clients? Do I need a coaching niche? How much should I charge? When do I keep work, when do I pass it on? Should I take work that I've not done before? How do I get work as an Associate? Do I offer a free session to help win business? I can't pay my bills – how long should I give it, before I give up?

One of us can still remember a sense of confusion and guilt when these issues were brought to her for supervision. A number of questions bubbled up for her: Why are they looking to me? Do I really have the expertise to support them on these matters? If I don't try to support them will they simply find a supervisor who will? Is this really supervision? Isn't this coaching the coach or being a business mentor? Shouldn't we be focusing on the coaching client?

The other of us has always been quite comfortable that these more commercial elements are illustrative of taking a holistic and systemic approach. Her mind set is more oriented to the notion that anything which impacts on the energy of the coach could impact on their clients and it is therefore a legitimate avenue of exploration in supervision. In truth this is now illustrative of the thinking of both of us - and these types of commercial questions regularly form part of our supervision dialogues. So what happened to that confusion and guilt? Was that naivety and in time a more mature view has been adopted? Or perhaps this "post-rationalisation" is just a bit too convenient? Undoubtedly the more successful our supervisees' business, the more likely they are to want to continue with supervision and to be able to afford it. That sounds like we have a vested interest in their success. Our ethical codes remind us not to exploit our position with our client – so when might this vested interest cause us to cross a boundary? Similarly, our ethical code reminds us to work within our sphere or competence. So what "competence" is necessary in order to support supervisees on these business related topics? Is running a successful practice ourselves sufficient – and indeed who should decide what "sufficient" looks like? The supervisor? The Supervisee? Or the professional bodies?

So where is the guidance in the literature for handling these tensions? In our journeys we have yet to come across anything which helps us navigate this particular supervisory role that features work with independent coaches. When we consider the evolution of the Coaching Supervision literature it is striking how much influence the therapeutic world has had. Many of those practitioners who are leading figures in the

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current world of Coaching Supervision, started their journeys in the therapeutic arena. It is perhaps not surprising therefore that the focus of Coaching Supervision models and frameworks emphasise the more clinical and relational aspects of the coaching work, rather than the business issues of the practicing coach delivering the work. So, perhaps we have identified an omission in the literature, or an emerging area of re-focus? Perhaps by borrowing from pre-existing helping professions where this commercial element of the system is less prevalent, authors to date have overlooked this particular influence in the independent coaches world?

Alternatively, perhaps we do not need to see this as an omission. Rather we are highlighting an opportunity for re-focusing what is “in scope” for practicing Coaching Supervisors. For instance, the notion of the “restorative” function of supervision may already consider as legitimate anything which has an impact on the coach’s energy to work with their clients. And perhaps, conceptually at least, it is covered by the ethical frameworks of our professional coaching bodies? However, even if this is so, we would question whether this is enough to ensure that Coaching Supervision provision for independent coaches is the best it can be. In our view more is needed to help supervisors support and enable Independent Coaches to appropriately navigate the complexity of their commercial world.

This article aims to bridge some of the gap. First we offer some definitions of coaching supervision to clarify what practice we are referring to. Secondly we will identify what kind of commercial issues get brought to supervision. Then we will consider how these more commercial elements align to the current theoretical understanding of the supervision purpose – the formative, normative and restorative elements of supervision. We move on to take a look at how the supervisor’s philosophy and background influences their willingness to work with this kind of content. Finally, we look at some of the potential ethical issues when working on this broader agenda with supervisees and offer our perspective on how to mitigate the risks inherent in this kind of work. Our conclusion clarifies that we believe commercial topics are a legitimate part of the supervision dialogue. However – we offer two contrasting stand points namely an integrated and a differentiated approach to how commercial topics could be positioned within the supervision dialogue.

What do we mean by “coaching supervision” ?

There are many definitions of supervision in the coaching literature – we identify here our favoured definition which is congruent with how both of us work and emphasises the collaborative nature of the supervision relationship. We hope it therefore offers a reference point for the reader to ground the narrative that follows.

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“Coaching supervision is a formal process of professional support which ensures continuing development of the coach and effectiveness of his/her coaching practice through interactive reflection, interpretative evaluation and the sharing of expertise.” Bachkirova, T.(2008).

Types of commercial issues brought to supervision:

From our experiences to date, we would organise the range of commercial topics brought to supervision into the following “types”. We also offer some questions which could help identify where potential boundary issues could arise.

“Doing business”: this could include questions relating to the traditional marketing questions of “Product, Price, Place, Promotion”. It might also relate to the administration of the coach’s business – for example creating a commercial contract template for use with organisations or considering how to chase a bad debt or how to manage a decision to become VAT registered with their existing clients.

Question: at what point does this become a consulting or business generation conversation?

“Doing Business together”: this could include co-operation directly for financial gain; offering support and opportunities by leveraging each other’s networks; referring work that more closely fits the other person’s expertise

Question: at what point does this lead to the supervisor exploiting their position? Or indeed lead to the coach exploiting the supervisory relationship? Or lead to a conflict of interest for either party?

“Being a business owner”: This could include experiences which lead the coach to question their ability to run a successful coaching business; it could also be about coping with the professional loneliness when leaving an organisation and becoming self-employed. Similarly, the ebb and flow of winning business can create highs and lows on a coach’s confidence.

Question: at what point does this become a “coaching the coach” or counselling conversation?

The theoretical perspective :

Let’s consider how the commercial aspects of supervision fit with the existing theory of supervision purpose. Here we use Proctor’s (1988) 3-fold classification, although there are other authors who offer similar distinctions. For example Kadushin (1976) from the field of Social Work & Education uses the labels of Educational, Supportive,

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Managerial and Hawkins & Smith (2007) use the labels of Developmental, Administrative and Resourcing. The table below considers the kinds of professional issues and the kinds of commercial issues coaches can bring to supervision – and we have mapped them against the 3-fold classification.

Supervision Purpose	Professional Development Supervision Issue	Commercial Development Supervision Issue
Formative	I'm stuck what else could I try?	How can I articulate my coaching niche?
Normative	What would other coaches do in this situation?	How much should I charge?
Restorative	Working with the client has highlighted that I need to do some work on myself	If I haven't got enough clients – perhaps I'm not a good enough coach?

From this we can see that there are parallels in the purpose behind the supervision regardless of whether a professional or commercial issue is brought to supervision. However, the subtle yet important difference comes from Inskipp & Proctor's reminder that our supervision work should ultimately be in service of the client.

*“Supervision is a working allianceThe object of this alliance is to enable the worker to gain in ethical competency, confidence and creativity **so as to give the best possible service to clients**” Inskipp & Proctor, (2001) [emphasis added]*

By "client" we take this to mean the person in the coaching chair. However, when the content of the supervision is commercial, the primary beneficiary is most likely to be the coach. It is this potential for dissonance that has led us consider the appropriateness of including commercial issues within the scope of coaching supervision work. Before we discuss this further, let us first explore how we have come to determine what falls into our supervision work with coaches.

What influences whether or not a Supervisor includes these commercial aspects?

In our discussions we noticed two key areas which influenced whether or not we included commercial aspects in our supervisory work. The first was around the philosophical underpinnings of our coaching and supervision practice. Interestingly both of us are influenced by Humanistic and Gestalt philosophies. As a result, we are curious about the system in which the client works and our attention is oriented to the 'whole' person. We also tend towards relational working. Therefore, when responding

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to the client's espoused needs, it feels quite natural for supervision work to include business development discussion. Secondly, the extent of our own business development and marketing experience influenced our inclusion of this more commercial focus. For example, our own journeys have both included significant experience of developing businesses, and indeed one of us, was actually a 'Marketeer' for some years. So in our particular cases, given our personal history there is a sense of underpinning competence with which we can approach this kind of supervision dialogue. We are both conscious that this is an "extension" to the role. As such we both appear to acknowledge this activity within the Coaching Supervision Contract that then guides the ongoing supervisory work. For example, one of us gets active agreement to monitor over time how much of the supervision dialogue is taken up with these commercial oriented issues in order to ensure that review of actual client work is not avoided. The other provides to new clients a list of 'Supervisory Responsibilities and Expectations' and includes their availability to 'explore any practice/accreditation issues that may arise' as well as, 'to share experience, information and skills appropriately'. In this case the over-arching guidance for both the Coaching Supervisor & the Supervisee are their respective codes for ethical practice. In addition, the initial meeting with a new Supervisee includes the sharing of an overview of the Coaching Supervisors philosophical underpinnings and model for working; making it clear to the Supervisee that working systemically and with the 'whole of them' includes the development of their practice i.e. their business. In this context it therefore feels entirely congruent (to us at least!) to bring our wider expertise to be used in the service of enabling a Supervisee.

Of course one of the features of both coaching and of supervision is that people from a wide range of backgrounds can offer value to their clients. It is commonly accepted that you do not need to be an expert on a topic in order to coach someone on it. Conversely, our justification of appropriateness outlined above, rests on the fact that we both do have experience in the commercial field. So what about supervisors who don't have a holistic philosophy and/or don't have commercial experience themselves? Do they also cover these commercial topics with their supervisees? And if so, with what rationale would it be appropriate? We have yet to research this point fully, but our sense is that they do, and that perhaps what happens then is most like "coaching the coach". Indeed, one of us took an issue of this nature to supervision only recently and their supervisor (who comes from an academic perspective) declared her sense of her own "naivety" on this topic, before entering into an exploration of the issue. This returns us to the importance of contracting and in this case re-contracting. Indeed, transparency around the supervisors sense of "felt competence" seems to be a helpful way of ensuring the supervisee's expectations are managed. The supervisee can then

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make an informed decision on the appropriateness of the supervisor to support them on more commercial matters.

What are the ethical issues when supervising coaches on a more commercial agenda?

The issue of “competence”:

When a supervisor provides support on commercial issues, the discussion is likely to have business related (i.e. Sales, marketing, financial, operational) overtone to it. For coaches developing their independent practice, this often draws from the supervisor a sharing of their own experience, perhaps as a mentor might do. Importantly our code of ethics reminds us to work within our sphere of competence. So if we look at our commercial expertise – what would “qualify” a supervisor to engage in this kind of support. This perhaps becomes increasingly important the more directive the supervisors working style, although in our view because we bring our “whole selves” to supervision it is almost impossible for our own experience not to influence the dialogue at some level. Do they need to have business qualifications? A broad exposure to business from an earlier business career? Or simply a track record of running a successful coaching business themselves? Interestingly when looking at competency frameworks for supervisor competence – there is no mention of needing a level of commercial understanding. Is this because it is not considered necessary or because it has simply not been considered?

The issue of “scope” and “boundaries”:

For the purpose of our argument here, let’s just assume that the supervisor is indeed competent to provide a level of business support. That frees us up to consider how far we can “stretch” the role of the Coaching Supervisor. At what point do we encounter a boundary when in order to serve the client well a different practitioner may be required? By way of analogy: one of us is a psychologist with counselling training and the other is a BACP accredited counsellor. Therefore, we both have the training and experience that would technically enable us to support a client who is experiencing a level of distress. However, if we are engaged as a coach – just because we could support them from a counselling frame, doesn’t mean we should. So if we apply this logic to the question of supporting a coach on business matters – just because a supervisor is a competent marketer doesn’t mean they should provide this support if they are engaged to supervise the coach. This provokes two issues – one that relates to the coaching client and one which relates to the supervisee. When we consider the coaching client - if the primary purpose of supervision is to act as guardian of the client work, then the focus on commercial issues might generate greater benefit to the coach than it does the coaching client? So what has happened to the coaching client’s

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needs? When we consider the supervisee – when is the supervisor genuinely the best person to support them and when should the supervisor be referring the supervisee to find support from a business mentor or an accountant or a marketing coach? Moreover, how would insurance companies view this ambiguity? Is this kind of supervisory work covered by a practitioner's Professional Indemnity insurance?

Financial considerations

Here we consider the question of determining an appropriate fee for the service delivered. How should engaging in these more commercial matters be reflected in the Supervisor's sessional rate? Some supervisors charge an uplift of 10-20% on the coach's own fees to acknowledge their additional supervisory skills. Is that an appropriate "uplift" when the supervisee is drawing from them their wider commercial experience and perhaps using them more as a colleague? Interestingly, some supervisors charge less for supervision services than they do for their coaching fee, on the basis that the supervisory relationship is an 'ongoing' commitment to a long term professional relationship. However, if the supervisor manages these commercial matters as though they are "coaching the coach", perhaps they should be charging their coaching rate rather than their supervision rate? Or you could take the view that it doesn't matter, that separating out the different elements of support is overly complex. Perhaps if the contract outlines what might be covered and what the sessional rate is and both parties are happy – perhaps that is sufficient?

Managing conflicts of interest

We have noticed that the intensity of this kind of commercial support is greater with the novice coach (or experienced coaches that are coming out of internal positions into independent life). Therefore, one of us experimented with creating a service offer dedicated to the commercial elements of support, and this was priced separately. However, it was with limited success. It seems that whilst most coaches will bring commercial questions to supervision at some point, if they are offered the opportunity to form a support group to focus on business issues, there is little take up. In the pilot group there was clearly a nervousness about working with other coaches and "revealing" too much about how they managed their business. This experience, interestingly, flags up why it may actually be entirely appropriate for this area of work to sit within Coaching Supervision, where the Coaching Supervisee and their business are held within the contracted confidentiality of the relationship.

Of course conflicts of interest might not just be generated amongst peer coaches, there might also be conflicts between the supervisor and supervisee. The supervisor's perspective on whether there is a scarcity or abundance of coaching work, may well

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influence how comfortable a supervisor is supporting another coach to win more business. Overlay on this a common geographical “patch”, client sector or typical coaching assignment and very quickly the supervisor or the coach may begin to feel a rising anxiety. What happens when the supervisor recognises that supporting the supervisee to develop their own business, might serve to erode their own coaching business? Whose business benefit will take priority?

Another common experience relates to the supervisee’s motivation for selecting you as their supervisor in the first place. How much of this related to your perceived competence in supervision and how much related to their desire “to get close to” a successful coach? For one of us our most dreaded request is, “Could you introduce me to the Associate company you work for”? A simple enough request on the one hand, however, we have certainly had supervisees with whom we are happy to work with in support of their development needs and yet would not feel that they have a level of skill which we would endorse to a 3rd party. Especially a 3rd party whom we rely on to generate work for us. This situation raises a number of questions for the supervisor: What if they didn’t “pass muster”? How would this reflect on me? Am I being selfish? Am I feeling insecure? Yet again the supervisor could adopt a position in the contract which provides for this possibility. However, in reality whenever the request is made it can provoke a conflict of interest – say yes and open up more complexity, say no, and potentially lose a client or risk a dent in the relationship.

So how can we navigate this complexity ?

Let’s start with the notion of informed consent – from this base it is possible to consider how we can provide sufficient information for the supervisee to hold the responsibility for the decision they make. Ideally this would be done in the contracting phase – the following items could guide the supervisor’s contracting discussions:

- The supervisor can be proactive to highlight that commercial issues could fall into the supervision dialogue
- The supervisor can be clear about their level of commercial expertise and their preparedness to bring that into the supervision relationship – or not
- The supervisor can enquire whether the coach has considered other routes to getting business support – a different supervisor, a marketing coach or other training
- The supervisor can observe the proportion of time spent on issues relating to the coach’s business compared to the coach’s clients and raise awareness of what might not be being discussed

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- The supervisor can signpost when the support requested will require a more business-mentor than coach supervisor input – and check that the supervisee is making a conscious choice to use the supervisor this way.
- The supervisor can discuss whether their supervision fee covers a whole range of support or whether there might be some activities for which a greater or lesser fee is appropriate

Proposing a Position:

Interestingly, despite a similar approach to our practice, we each take a different stance regarding how we would like the Coaching Supervision community and Supervision Theory to “treat” commercial topics.

Position 1 : Favouring a “holistic” approach

This position considers that many topics including those with a commercial flavour may consume the coach’s energy for their work. Whilst the presenting issue might be business related, they can nonetheless be mapped to Formative, Normative and Restorative reasons for supervision. Therefore, the existing 3-fold classification is sufficient. See table 1 above.

Short Case Study :

The supervision client: An individual who is a newly qualified independent coach. Whilst relatively new to the field of coaching, she already had an established business portfolio of work. This included a mix of consultancy work; developing and delivering bespoke training packages in creative arts and her own employment as a dancer. Her coaching practice was being developed alongside these established activities. In the context of her other work, this would be considered a relatively small coaching practice; one where on average she worked with one to three clients at any one time.

The supervision topic: She specifically sought a Supervisor who would be able to give her the space to address the ‘whole’ of her work: her developing coaching practice, alongside maintaining her other areas of interest. This need was discussed fully in an introductory meeting and supported with an explicit mutually agreed contract for working that sought to ensure that these needs were met.

The supervision dialogue: The Supervisory relationship developed over several years. The frequency of meeting was directly associated with the number of her coaching clients, alongside her own sense of what she found supportive in relation to managing her portfolio of work. In the course of the relationship, by working with the whole of her system – all aspects of her portfolio, as well as her client work – several specific areas were brought or became themes that she would review regularly:

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- A constant need to ‘balance’ the supervisee’s passion for variety with a need to ensure that each aspect of her business was giving her what she needed: income; satisfaction and importantly an opportunity to grow. [FORMATIVE]
- Specific time attending to the ‘ebb and flow’ of business: time to reconcile, normalise dips in client numbers whilst still paying attention to the question marks this often raised in her; ‘am I good enough?’ often sitting closely with ‘do I need to do more marketing?’, then checking these against her own chosen desire to have a varied range of work and thereby re-focus on her own norms [NORMATIVE]
- Attention to the supervisee’s self-care in relation to her client work alongside her other areas of business: ensuring that she felt enabled and available to her clients and remained alert to the different hats she was asking herself to wear, managing boundaries and ethical practice in relation to all matters of business [RESTORATIVE]

In this position, we hope to have illustrated how even though the context of the supervision often concerned commercial issues, the focus of the dialogue was the impact on the coach herself. Further the issues discussed could be positioned within the existing purpose of supervision. Here the Coaching Supervisor was able to meet the Supervisee’s need to attend to all aspects of her work: from bringing her clients to considering her coaching practice in relation to other parts of her business. There was no need to refer the supervisee to additional professionals as both parties contracted for this work to take place within the supervision relationship.

Position 2 : Favouring a “differentiated” approach

In this position it would be regarded as legitimate to include topics with a commercial flavour in supervision as separate and additional to the existing 3-fold classification of supervision purpose. This does suggest that a 4th label would need to be found to describe this additional classification. We would suggest the following, which also re-tables the original 3:

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Original (from Proctor)	New	Definition
Formative	Technical	Focusing on matters relating to the supervisees coaching client work eg, techniques, competence, skills, the process of coaching
Normative	Ethical	Focusing on the congruence or dissonance between espoused philosophy and ethical codes with actual practice.
Restorative	Personal	Focusing on the coach's energy (however caused) for their work and how this is impacted by their clients and vice versa
	Commercial	Focusing on matters relating to the supervisee's coaching business

This would be contracted for in a transparent way. It is the responsibility of the supervisor to declare the basis on which they would provide support these issues and it is the responsibility of the supervisee to decide whether or not this is sufficient for their needs

Short Case Study :

The supervision client: An individual who has worked in meteorology has set up their own coaching business, they have also got a small but profitable practice offering "Reiki". They defined their target customers as senior professionals returning to work after having a child. They engaged their supervisor as they recognised the value that supervision can bring to their client work (influenced by their husband who has been a marriage guidance counsellor for many years). They met their supervisor at a co-coaching networking group.

The supervision topic: They do not have many coaching clients at the moment and want to develop their business. They don't currently have an extensive network and are seeking support on developing one.

The supervision dialogue: There were a number of strands to the early sessions:

- Re-visiting their chosen niche. Clarifying how much of their decision to work with this target customer was influenced by their perception of the available market and how much by their belief of their level of competence with this type

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of client [Note the focus on the service the client might receive not the characteristics of the niche itself]

- Exploring their current network: Probing to consider whether they were seeing connections between their husband's job and their target client group and clarifying how aware they were of potential boundary issues and conflicts of interests. Bringing into the room the question of whether they were hoping the supervisor could share their network of contacts with them. Prompting them to generate ideas on how they could develop their network for themselves. [Note the focus on ethics of leveraging the networks available to them]
- Leveraging their own expertise: Helping the supervisee draw comparisons between how they developed their "Reiki" business and how that might inform the development of their coaching business. Unpicking the similarities and differences between their "Reiki" client base and their coaching client base. Sharing insights from the supervisors own practice about how these coaching clients might think – and inviting the supervisee to find ways of testing these out to build their own understanding of their particular client segment. [Note the adoption of a mentoring role – offering information that it was not possible for the supervisee to know "yet"]
- Enquiring about existing client work: reminding the supervisee of the intent for supervision to consider client work, enquiring how client work was progressing and how they were feeling about that work. Scanning that dialogue for an understanding of whether there might be a need to put more attention to their existing client work. [Note the concern that commercial issues should not overshadow issues of coaching practice]

Several months in, it became apparent that the rate of acquiring new clients was very low, there was a shift to the supervision dialogue:

- Challenging the logic of the niche: reflecting back the disconnect between the logic of their chosen niche with the reality of the starting point of their network and their articulated financial goals. Enquiring how that has manifested itself when talking to potential clients and how it manifested with clients coming to the end of their programmes. [Note the emphasis on checking the potential for the supervisee's commercial "dependency" on existing clients, and on ensuring their clients were not being pressured to continue]
- Duty of care to the supervisee: Providing observation on the focus of their business development, its slowness of success and checking what impact this

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is having on her wider life. For example; in giving attention to the coaching business, what has happened to her “Reiki” business, in falling short of her financial targets how is that affecting her household budget; in making less progress on her business plan than anticipated, how is that affecting her confidence as a coach? How is it affecting her motivation for developing the business? Providing a sanity check around how long she will pursue this avenue before revisiting her chosen niche. [Note the concern for the person and the system of which they are part]

In this position, we hope to have illustrated how the same matters could have been addressed through using a marketing or business coach. However, through using a supervisor to explore these issues there was a greater emphasis on the impact on the coaching client, and a greater opportunity to bring a familiarity with the world of the coaching client into the discussion. In addition, the supervisors specific coaching expertise brought a proactivity around spotting potential ethical issues before they occurred, and which arguably those professionals without an understanding of a coach’s ethical code may have been less aware of.

Conclusions:

In our view it is legitimate to include commercial issues as part of the coaching supervision dialogue. It can be helpful to see these issues either as an integral part of the existing supervision framework or to see them as separate and additional. Whichever framework appeals most we would espouse that coaching supervisors need to articulate how they work with these commercial issues through the contracting process, so that the supervisee can make an informed decision on the nature of support that will serve them most effectively. We offer some guidance that both supervisors and supervisees could use to help ensure clarity on the scope of the supervision work.

In writing this piece, we became more aware of how the coaching supervision literature is influenced by what has gone before in the supervision of other helping professions. We believe these therapeutic roots have served to make us less aware of the commercial tensions involved in coaching, particularly amongst independent coaches. We have started to wonder what else might have been given scant attention as we have borrowed from our more therapeutic colleagues. We have raised the question of whether the current understanding of a Coach Supervisor’s competence needs extending. We hope that this article has given readers food for thought in their own practice and we would like to invite wider exploration of what best practice

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What's your practice?

Whether you are a supervisor or a supervisee – we'd be interested to hear your experiences of this type of supervision. Do you see it as an integral part of what supervision is or is it an added extra? If it is "additional" – then how would you label it? Has this article in itself made you question the appropriateness of what you naturally do or underlined the degree of comfort you already feel. We'd love to hear your views!

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The authors would welcome hearing from other supervisors with similar or different backgrounds. Is the scope of your work covered by definitions in the existing literature? Would it help to have a 4th function of supervision? If there were another "category" - how would you refer to it?

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