



Life Coaching Handbook

Developed for Life Coaching Training and Education at
Indiana Wesleyan University
by The Center for Life Calling & Leadership

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by

The Center for Life Calling & Leadership

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I am not interested in people who allow circumstances to control their lives. I am interested in people who invent the circumstances they need to shape their own lives.

– George Bernard Shaw

An unexamined life is not worth living.

– Socrates

Everyone has his own specific vocation or mission in life to carry out a concrete assignment which demands fulfillment. Therein he cannot be replaced, nor can his life be repeated. Thus, everyone's task is as unique as is his specific opportunity to implement it.

– Victor Frankl

Contents

Introduction to Life Coaching	1
Life Calling Theory & Model	7
Additional Coaching Theories & Perspectives	15
Overview of the Life Coaching Process	21
Coaching Delivery Systems	25
Coaching Competencies & Activities	27
Coaching Documentation	39
Coaching Policies at Indiana Wesleyan University	45
References	51

Introduction to Life Coaching

Definition

Life Coaching is a professional partnership between coach and individual focused on the discovery of one's life direction, and is based on a holistic and action based approach that promotes the process of understanding overall life purpose.

What Life Coaching is Not

To further clarify and understand what life coaching is it is often helpful to refer to what it is not. Within helping professions there are several overarching themes and competencies that one must possess and understand to be successful. However, there are also distinctions between the focus and practice of these professions that should be made clear that enable one to recognize the scope and limitations of life coaching. Counseling and consulting are two such helping professions that should be made distinct from life coaching to illuminate one's understanding.

Life coaching is not clinical counseling. McCluskey (2008) and Martin (2010) make it clear that some of the most significant differences between coun-

seling and coaching are related to its orientation and focus. Below are some of the most prominent distinctions:

Counseling	Coaching
Oriented toward healing & brokenness	Oriented toward health, wholeness, and potential
Restores and maintains stability and functionality	Embarks on a journey toward fullness and calling
Focused on insight regarding the past and how to relieve pain	Focused on the future and how to pursue passions and dreams
Usually includes a DSM diagnosis and treatment plan	Usually includes establishment of personal goals and measures progress toward objectives
Counselor is generally seen as an expert that can provide intervention, insight, and advice that could not be gained without the counselors help	Coach is generally seen as a partner, guide, and catalyst in the client discovering their own calling and defining their own way to make progress toward their objectives

While these distinctions are clear, there are at times exceptions based on the needs of the client and the expertise and training of the professional. In addition, there often remain consistent and similar methodologies between the two. Both counseling and coaching assist in bringing about change in the life of the client along with an added sense of self-awareness and barriers to effectiveness and well-being. Both require skilled professionals and are largely reliant upon the efficacy of a trusting relationship between client and practitioner to be successful. And both depend on the skillful execution of specific techniques, such as active listening, reframing, positive regard, and documentation (Bluckert, 2005; Lind, Koefoed, Christensen, et al., 2009).

Life coaching is not consulting or advising. While little research has been published on this distinction in comparison to the differences between counseling and coaching, the contrasts should be made clear, especially when working in higher education and the corporate world.

Consulting/Advising	Coaching
Focus on present and future success in a specific area of focus (i.e. mastery of a skill, educational/financial planning, etc.)	Focus on present and future performance and effectiveness throughout a broad range of life issues (i.e. fulfillment of passions, dreams, and personal objectives from a holistic perspective)
Often oriented toward providing specific steps of action for the client to perform with a confidence that if those steps are followed a definite outcome will result	Often oriented toward promoting good decision-making and gathering of tools that will continue to serve the client in their future endeavors and life objectives
Methodology is directive and authoritative in nature	Methodology is supportive and facilitative in nature
Professional is generally an expert in a narrow field offering advice for achieving a specific need	Professional is generally skilled in providing information and resources for the client from a broad range of fields and networks

As it is with counseling, while the distinctions are clear there are some overriding similarities as well. Both consulting and coaching look toward maximizing the client’s unique talents and leveraging their strengths as a means of successfully achieving set goals or objectives. Both are focused on the present and the future. And both focus on the maximizing the client’s effectiveness and promoting their personal success.

Brief History of Life Coaching

In America during the early part of the 20th century, the economy of industrialization was at a surge with the growing use of automobiles, electricity, and indoor plumbing. Around the same time, between 1890 and 1920, vocational guidance rose in American culture and became permanent. In 1901, The Civic Service House opened in Boston. There Frank Parson's began lecturing to students about vocation and the need to make an informed choice when choosing a career path. Further recognition of vocation occurred in 1906, when The National Society for the Promotion of Industrial Education was created. This was an organized way of lobbying the government for changes in public schools that would incorporate industrial education and vocational guidance. In January of 1908, Parson's decided to open the Vocation Bureau at the Civic Service House under the motto, "Light, Information, Inspiration, and Cooperation" (Baker, 2009, p. 202) due to the overwhelming number of students who attended his lectures and wanted personal vocational guidance meetings with him. Throughout his time at the Civic Service House, Parson's began writing a book entitled *Choosing a Vocation*. Although the book was not released until 1909, one year after his death, people entrusted Frank Parsons with the title "father of vocational guidance" upon reading his work (Baker, 2009).

In light of a changing economy that once held dear to industry, but that now clings to individualism, there is an upheaval of employees who are looking for ways to keep up with the demands of "flexibility and innovation" (Lind et. Al, 2009, p. 30). These demands create a need for people to renew themselves and become better at their current place of employment, or seek out a different vocation altogether. This needed guidance has continued the vocational guidance movement, to what we now know as life coaching. This has been observed by many researchers and theorists, including Abraham Maslow. Maslow, who is considered the father of humanistic psychology, believed that there are people who are in a state of continuous psychological growth. He named these individuals "self-actualizers." According to Maslow, in order for "self-actualizers" to maintain continued psychological growth, they are in need of guidance, but not to the extent of clinical counseling. Life coaching meets this identified need

(Lind, Koefoed, Christensen, et al., 2009). The need has further been realized by the increased number of publications on the topic, which has escalated greatly. Between the years of 1937 and 1999, only 93 papers were published. Between 2000 and July 2007, a total of 262 papers were published (Grant & Cavanagh, 2007).



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Life Calling Theory and Model

Written by Bill Millard, Ed.D.

In working with people, we have concluded that the discovery of our life calling emerges from exploration of three crucial life components: foundational values, unique design, and personal mission. We have integrated these into a Life Calling Model illustrated in the diagram opposite. Each of these components can be explored in isolation from the others and are in many college courses of study. But it is only when the components are combined and integrated that the dynamics of life calling emerge.

The arrow in the model indicates that the discovery of our life purpose most typically starts with establishing foundational values in our lives. We must then examine our unique design, which gives us distinctiveness compared to others as to how we live out our values. From this we then can formulate our values and design into a personal mission to make the world a better place.

Foundational Values

At the core of each person's life, there exists a set of foundational values the person holds about reality, themselves, and others.

Faith forms the first foundational value. Faith is used here in the sense of Life Premises-the value we hold about reality.

- Faith comes as a noun from seeking and discovering meaning in the most comprehensive dimensions of who I am, why I am here, and how I got here.
- Faith continues as a verb in an ongoing, dynamic act of composing and dwelling in some conviction of what is ultimately true, real, and dependable within the largest frame imaginable.

Character forms the second foundational value. Character is used here in the sense of Life Congruence- the value we hold about ourselves.

- Character starts with my capacity to determine how the universal principles of my faith should be applied to my values, goals, and actions.
- Character is fully realized when I actually implement what I have determined in all aspects of my life.

Service forms the third foundational value. This is best understood in the sense of Life Connection -the value we hold about others.

- Service starts with my capacity to respect others in a spirit of community.
- Service is fully realized when I actually take actions of character that are carried out with a sense of concern and responsibility for others.

Unique Design

Foundational values may have universal application, but they have individual expression as they are conveyed through our unique design. This unique design can best be observed in the distinct characteristics that combine to make us who we are, the things we deeply care about, and how all of these are shaped by what we encounter throughout life.

Strengths form the first element in our unique design. These emerge from an assets-based, holistic approach to our lives that offers the greatest potential for success.

- It is an assets-based approach because it focuses on identifying and developing strengths. This is contrast to other approaches that focus on correction or elimination of weaknesses. Our studies show that the concentrating on eliminating weaknesses can at best result in achieving a level of what we call non-failure/non-success. To achieve success a person needs to maximize strengths.

Strengths MATRIX [®]			DIMENSIONS				TOTAL
			Gifts	Knowledge	Skills	Attitude	
D O M A I N S	<i>Body</i>	Physical					
	<i>Heart</i>	Emotional					
	<i>Mind</i>	Intellectual					
	<i>Soul</i>	Psychological					
	<i>Spirit</i>	Spiritual					

- This is also a holistic approach because it addresses a broad spectrum of strengths. We define these as capacities we have in five important life domains:
 1. ***Physical Strengths*** - the capacity of our life that gives our body distinct features and enables us to perform actions with our body
 2. ***Emotional Strengths*** - the capacity of our life that enables us to identify, access, generate, understand, regulate, and use feelings and sensibility
 3. ***Intellectual Strengths*** - the capacity of our life that enables us to discover, understand and apply truth in an ever-expanding manner
 4. ***Psychological Strengths*** - the capacity of our life that enables us to exercise our will in deciding upon courses of action
 5. ***Spiritual Strengths*** - the capacity of our life that enables us to discern and respond in service to divine supernatural inner leading

Within each of these domains, our overall strength has four dimensions.

First, our strengths emerge as *gifts* inherent in our lives. These are capabilities and features in a strength domain that came into our life without our own doing.

Second, our strengths are enhanced by *knowledge*. This is the information and understanding we gain by learning about a strength domain and how to incorporate it into our life.

Third, our strengths continue to grow as *skills*. These are abilities we develop in a strength domain by repeated practice of the disciplines and actions associated with the domain.

Fourth, our interaction with our strengths is greatly impacted by our *disposition*. This is the attitude that we develop and adopt that reflects our beliefs and values concerning a strength domain.

The fifth column, TOTAL, shows that the overall strength in a domain is the synergistic combination of all of the dimensions. It is this total whether a domain is functioning strength, a undeveloped-or underdeveloped potential strength, or a supporting area in life that will likely never take the leading role.

Passions we have for life form the second element in our unique design. Passions are those things we desire intensely. They burn within our heart and often drive the actions or paths we take. These passions emerge three levels in our lives:

Level 1: *Interests*. Passions often find their beginning with options in your life that attract your curiosity.

Level 2: *Desires*. Some of our interests may increase to a level at which you would definitely pursue them if you had no limitations.

Level 3: *Sacrifice*. The best indication that a passion has really developed occurs when you reach this level of sacrifice. These are desires you care about enough that you would be willing to dedicate or give your life for them.

When you ask the question "Would I be willing to set everything else in my life aside for it?", much of what you might think was at the passion level disappears, and you find out quickly that it was at best a desire and more like just an interest.

Experiences form the third element in our unique design. Our strengths and passions are fundamental to our unique design, but these are molded and reshaped by our life experiences.

As an example, coal, graphite, and diamonds are all elemental carbon, yet they end up with very different properties and uses, depending on how much heat and pressure the carbon has experienced and how long the process lasts. Similarly, our strengths and passions develop in a distinct pattern based upon our unique experiences. Three factors determine the impact of these experiences:

- *Circumstances* comprise the first of these factors and evolve from the quality of the elements that impact an experience.
- *Intensity* is the second of the factors, stemming from the strength of influence this experience had on our life.
- *Time* is the third factor-both the point of time in your life in which this experience occurred and the length of time it lasted.

It is also important to realize these experiences have an effect whether they are triumphs with rewards or mistakes with consequences.

Like the proverbial snowflake, every person who has ever lived possesses a unique design. Each person's strengths, passions, and experiences are a little different than anyone else. And it is this difference that gives rise to a unique life purpose.

Personal Leadership

Our foundational values and unique design set a stage that enables us to live out personal leadership as we interact with all that goes on around us, begin to visualize how things could be better, and then engage in action to bring about positive change in the world.

Situations. Personal leadership begins to emerge from our encounter with and response to different situations within the world. Life calling entails relationships of service within community. Throughout the world we encounter different types

of people, locations, opportunities and problems. It is impossible for any one individual to respond in service to all types of these situations. To successfully implement personal leadership, we need the freedom to respond in a focused manner to certain people, locations, opportunities and problems. If we are not sure about what in the world is drawing us, then we should examine what types of situations within the world we find ourselves most often encountering. Many times the two go hand-in-hand.

Vision. The second element in our personal leadership emerges as we begin to formulate a vision...a picture for a better future in response to the people, situations, and needs to which we are drawn. Vision is a picture, not a task or plan. What will that future we envision look like? This kind of vision arises from three qualities:

- Imagination - We need to picture ourselves in that future.
- Inspiration - We need to let the voices of our spirit, soul and heart speak as loud as our mind and body.
- Independence - We need to resist being bound by the past or the limits others have tried to place on us.

Action. Finally, as the vision becomes clear, we take steps to carry out the vision in world-changing action. The actions we take to change the world do not have to be in an official, recognized position of leadership. World change more often results from unofficial leadership that impact the world with a positive influence in connection and collaboration with others.

Additional Coaching Theories and Perspectives

The philosophy behind the life coaching process at Indiana Wesleyan University is directed largely on Millard's (2011) theoretical design on life calling. The life coaching methods that are used are further informed by many additional coaching theories and perspectives.

Positive Coaching/ Wellness Model

Positive coaching, also called the Wellness Model, leads clients toward their natural strengths and encourages them to focus on those, rather than weaknesses (Spence & Grant, 2007). This type of coaching is often craved by clients in a culture that more naturally focuses on weaknesses. Anthony Grant, a researcher of positive theory, stated that clients "have a thirst for techniques that enhance life experience and performance" (Grant, 2006, p. 17). It is a more beneficial, encouraging, and enjoyable experience for clients to have the permission to focus on their strengths and utilize them (Grant, 2006). There are

several Wellness Model components, including physical, social, psychological, intellectual, emotional, and spiritual. The following definitions of these components come from the Adams et. al (2000) study conducted to research wellness in the college population.

Physical wellness - “A positive perception and expectation of physical health.”

Social wellness - “Perception of having support available from family or friends...and perception of being a valued support provider.”

Psychological wellness - “Perception that one will experience positive outcomes to the events and circumstances of life.”

Intellectual wellness - “Perception of being internally energized by an optimal amount of intellectually stimulating activity.”

Emotional wellness - “A secure self-identity and a positive sense of self-regard.”

Spiritual wellness - “A positive sense of meaning and purpose in life” (Adams et. al, 2000, p. 167).

When there is not wellness in one or more of these categories, this is considered to be a type of “illness.” “Illness” in the wellness model means “perception of disconnection, poor self-esteem, poor physical health, pessimism, existential frustration, lack of intellectual stimulation, or any combination of the above” (Adams, Bezner, Drabbs, et al, 2000, p. 166).

Solution Focused Therapy/ Generic Model of Self-Regulation

Like positive psychology, solution focused theory and ideas of self-regulation bring attention to the solutions of a problem rather than the problem itself. The presenting issue is identified, and steps are quickly discussed between the coach and client on how to attain desired goals. Solution focused theory

assumes that people are competent enough to know how to construct solutions that can enhance their lives. Both solution focused theory and self-regulation ideas focus on what is and is not working, and encourage the client to engage in those actions that are working to reach the goal.

Solution focused theory typically uses sets of specific questions to discover what is working in a client's life. First, exception questions are used to direct attention to times in life when the presenting issue did not exist for the purpose of discovering what the individual was positively engaging in at that time. An example of an exception question is: Was there a time in your life when you were certain about your life calling? If so, can you tell me how you came to that conclusion? Second, miracle questions are used for the purpose of discovering a client's dream. For example, if the client is unsure which major to pursue due to the many options available, a coach may ask: If you woke up tomorrow morning and a miracle had occurred- you knew exactly what God was calling you to do- what would your daily life look like as you engaged in that calling? Lastly, solution focused theory also uses scaling questions when changes in the client's experiences are not easily observed. For example, a coach may ask a client weekly what their confidence in a life calling is by stating: On a scale from one to ten, with ten being completely confident in a life calling and one being not at all confident in a life calling, what number would you give to your current confidence in a life calling? What are the steps you could take this week to move your number __ closer to number __? (Corey, 2005, p. 394-395).

Self-regulation theories typically use a more structured approach than solution-focused theory. In his article entitled, *The Impact of Life Coaching on Goal Attainment, Metacognition and Mental Health*, Anthony M. Grant discusses a fluid model called the Generic Model of Self-Regulation that is both helpful when formally seeing a coach, as well as informally when setting personal goals throughout life. The steps to this model include: setting a goal, developing an action plan, living out the action plan, monitoring performance through self-reflection, evaluating performance by comparison to the standard by way of insight, and then changing what is not working and do more of what is working

toward the goal. The role of the coach is to facilitate movement through the steps so the client continuously strives toward goal attainment (Grant, 2003).

Cognitive Behavioral

Cognitive behavioral theory states that humans are born with both rational and irrational thinking processes. The pattern of these processes creates a cognitive map for each person. This term was first used by American psychologist Edward Tolman in 1947. Cognitive maps are “one’s internal representation of the experienced world” (Michaels, 2010, p. 25). When irrational thought processes, or cognitive distortions, dominate an individual’s cognitive map, it is harder for them to make clear, definitive decisions. These cognitive distortions include:

- Arbitrary inferences, or “making conclusions without supporting any relevant evidence
- Selective abstraction, or “forming conclusions based on an isolated detail of an event”
- Overgeneralization, or “holding extreme beliefs on the basis of a single incident and applying them inappropriately to dissimilar events or settings”
- Magnification and minimization, or “perceiving a case or situation in a greater or lesser light than it truly deserves”
- Personalization , or “relating external events to oneself, even when there is no basis for making this connection”
- Labeling and mislabeling, or “portraying one’s identity on the basis of imperfections and mistakes made in the past and allowing them to define one’s true identity”

- Polarized thinking, or “interpreting in all-or-nothing terms, or categorizing experiences in either-or extreme” (Corey, 2005, p. 284-285).

Research has revealed that behavior is directly related to an individual’s physical neural connections. Each belief and habit is contained in a neural pathway of the brain. “Each time a person has a thought, that thought is communicated along these pathways sending electro-chemical messages...The more often one experiences the same thought or behavior, the stronger that neural pathway holding that thought or behavior will become” (Michaels, 2010, p. 25-26).

Systems Theory Approach

Although American culture has contributed to many people living from an individualistic perspective, the reality is that we have all been born into a family and a culture. Through familial and cultural relationships, or lack thereof, each person has learned various lessons, been taught a set of beliefs, and has constructed spoken and unspoken rules about oneself and most aspects of life. In life coaching, the client rarely brings a family member to session physically. However, it is important to remember that family and culture, in some context, is a part of each client. Exploring familial and cultural dynamics can shed much light onto the coaching process. Therefore, coaches are advised to learn some about the client’s family of origin and any cultural differences in the initial intake, as well as beyond when appropriate. For example, a student may be unable to decide on a major because the majority of that individual’s choices have been made by the parental system. This may be the first time the student has been faced with making a choice alone. Or, a client may be fully engaged in the life coaching process, but come one week and be the opposite, fully disengaged. Ignoring this apparent change may not only be harmful to the coaching relationship, but also could hinder the coach from discovering that the client’s parents announced they were going to divorce. Do not be afraid to explore family and cultural relationships in coaching. Remember, though, that life coaching is for client’s to develop clarity about direction and purpose in life. If

the content of the sessions begin to focus on family issues, this is out of the scope of practice for coaches. The life coach should, therefore, refer the client to an organization equipped to deal with the presenting issues in depth.

It should be remembered by life coaches that a client's level of confidence in decision-making is increased by the level of healthy support from parents, siblings, peers, or mentors in the client's life. A healthy level of support can be seen by the support system providing the client with the ability to make choices, while still being involved. Healthy support is not characterized by enmeshment or detachment, but is found in the middle of these extremes (Zimmerman & Kontosh, 2007). "Enmeshment refers to a condition where two or more people weave their lives and identities around one another so tightly that it is difficult for any one of them to function independently. The opposite extreme way of relating, detachment, refers to a condition where the people are so independent in their functioning that it is difficult to figure out how they are related to one another" (www.mentalhelp.net).

While the life coaching process is firmly rooted in the Life Calling Model, considering positive coaching, solution-focused, cognitive behavioral and systems theories can equip us with tools that help us support the Life Calling Model through our coaching practice and methodologies.

Overview of the Life Coaching Process

While each client's coaching process will be customized specifically for them, there are some similarities in our client's needs as well as the process. The following is not meant to be a rigid set of rules or steps that must be followed. It is meant to be a helpful tool in guiding a coach through a series of milestones that could help meet their client's needs.

Intake

The first milestone in the life coaching process is performing an intake with the client. The intake should be primarily focused on gathering and presenting information. Information that should be gathered include:

- **Client Coaching Objective:** This is the client's reason for seeking life coaching. The coach should help the client frame their reason as an objective or goal that they would like to accomplish, rather than a problem they need to overcome.

- Referral Source: Obtaining information about how the client came to hear about the coaching services can be valuable from both a point of assessment for future marketing and to help clarify any misconceptions about coaching services.
- Informed Consent & Confidentiality: It is important that the client understands what life coaching is, what it is not, and what expectations they are agreeing to by participating in the process. It is also important that the client understands the expectations and standards of conduct that the coach will hold themselves to. One of the most important professional standards is confidentiality. The coach is responsible for ensuring that the client understands the scope and limitations of confidentiality early in their first session.
- Client History: The majority of time in an intake is spent gathering the client's history. Pieces of their family, educational, spiritual, mental health, and/or medical history can all be important in gaining an accurate understanding of the client, developing a good coaching relationship with them, and guiding them in achieving their goals. It is helpful to just ask the client to tell you their story and be a curious listener, rather than trying to diagnose or fix any problems at this point.
- Next Steps: After gaining and sharing a good amount of information with the client, they both make a determination of whether or not to move forward in the life coaching process. If they do move forward they discuss what must be done before their next meeting. If they do not, the coach should be able to refer the client to another resource that will best meet his or her needs.

Commitment to Foundational Values

During the second milestone in the life coaching process, it is essential for the client to identify with and commit to a core set of foundational values.

One way of identifying their values is through the use of a values card sort or values clarifying exercises. Once their values are identified, the client must decide if they are willing and ready to commit to living a life in congruence with those values. It might be important for the coach and client to discuss any current areas of life/value dissonance and how those will be addressed before moving on to the next milestone. It can also be helpful to ask how the client's values are currently being honored in their life, and how they plan to intentionally honor them in future decision-making.

Identification of Unique Design

Identification of unique design can be an extremely energizing milestone for both the client and the coach. During this milestone the client identifies his or her strengths, as represented on the *Strengths Matrix*, his or her interests, desires, and passions, and their most impacting or significant life experiences. When each of these components of the client's unique design are identified, reflected upon, valued, and owned, the client typically turns a proverbial corner in their understanding of themselves and their capacity to impact their own present and future. This identification can happen through a series of assessments and discussion-based or reflective activities.

Realization of Personal Leadership

After the third milestone is reached, it is important to continue on. It is very easy for the client to become content with their new understanding of themselves and resist moving forward and applying that new understanding to action in their lives. They go from realizing who they are and who they want to be, to an understanding of what they want to do and who they want to impact. They start to connect with the world outside themselves through envisioning and action steps. Future strategic planning can be a significant piece of realizing how their personal leadership will be lived out, whether planning for the next 60 days or the next 60 years.

Connection to Resources for Next Steps

There usually comes a time in the coaching partnership when, to reach their goals effectively, the client needs to be connected to resources outside of what the coach can personally provide. During this milestone, the client can use the tools that he or she has gained in coaching and apply them to their interactions outside of their coaching sessions. These connections might need to be made to realize personal health, career, or family goals. Whatever the connection and whatever the need, the coach serves as a stabilizing and encouraging force during this milestone, as the client builds their external support and accountability network.

Completion & Assessment

During this milestone, the client's achievement of objectives in coaching, their satisfaction with the process and their future steps should be discussed. Completion is an important step to bring closure to both the coach and the client as they celebrate what has been accomplished through their partnership and acknowledge that it must end for other things to begin. For the individual coach or the coaching program as a whole, it is often also helpful to perform some sort of assessment at this time.

While different clients and coaches might begin or end at different points in this process based on their objectives and circumstances, the general progression through these milestones is a fulfilling method for clients and coaches alike.

Coaching Delivery Systems

Individual Coaching

Individual coaching can be a necessity for individuals that desire to expand their personal reach, accomplish specific goals, and truly want to deepen their individual discovery and growth through coaching. Many of the techniques and skills mentioned below are used in all coaching delivery systems and some will be more suited for a one-on-one coaching relationship.

Co-coaching

Co-coaching can be a beneficial alternative method of doing coaching sessions. Co-coaches are able to both observe and interact at the same time and provide feedback to each other about the session. It is important that the co-coaches respect each other and are able to work together as opposed to working against each other. This type of coaching may take more preparation before a session so that both coaches know what the goal is for that day. It also requires flexibility between coaches because sessions often do not go perfectly as planned.

The co-coaches can be any combination of age and gender if they are willing to work together. It is important that the coaches are aware of their own personality strengths and those of the co-coach so that the session is enhanced instead of becoming a jumble of competing ideas that may be to the detriment of a client. Myer-Briggs Type Indicator (MBTI) is a valid and reliable tool in discovering these differences between people. Warning: If coaches are competitive in a session then the client loses (Little, 2005).

Group Coaching

Group coaching is a method of helping more than one client process simultaneously through their decisions and goals. A group usually consists of five to ten members. While group coaching can happen in a variety of formats, typically, a group meets on a weekly basis for 1-1 ½ hours for eight to ten weeks. The group can be either open or closed. Having an open group allows people to join and leave the group at any time during the group's duration. Closed groups start with a certain number of people and no new people are allowed to join after the start date.

When forming groups, it is essential to conceptualize the goal for the group process. If the goal is for those in life coaching to make decisions about their future, then the group topics should be formed around that goal. Goals can vary from group to group, but it is important that the goal is understood before the group begins.

It is important to note that the coach's theoretical framework will influence how group will be structured and how change will occur (Corey & Corey, 2002). In group coaching settings, the coach will want to be sure to allow flexibility in their coaching for the group process to be as powerful as possible. As a coach, they need to see and attend to each individual client in the group, as well as seeing to the needs of the group as a whole. They also need to realize the group will be of powerful service to itself when given the permission and a safe environment to do so.

Coaching Competencies & Activities

Rapport Building/ Empathy/ Attending Behavior

Developing a strong rapport with each client is essential to ensuring the best possible result of the coaching experience. This is done from the point of introduction by creating an environment that is friendly, inviting, and safe. A positive environment can be created with simple gestures, such as a firm handshake or a smile (Michaels, 2010). Also, being empathetic builds not only a positive environment, but trust also between the client and coach. Empathy should not be mistaken with sympathy, however, as empathy involves support and “helping the student get clarity and understanding about their situation. Sympathy creates false niceness” (Rice, 2007, p. 566).

One problem that is frequently encountered by the inexperienced coach is the issue of transference or countertransference. It is inappropriate and ineffective for the coach to redirect their feelings about their own experiences, issues, problems, or successes onto their client or assume that they are dealing with the same thing. Continually staying curious about the client and their situation can help guard against this, as well as consulting with an experienced coach if you ever suspect that transference could be an issue.

A strong rapport with a client can also be built by using appropriate attending behaviors. An easy way to remember what attending behavior looks like is to review the following acronym:

SHOVELER (Or SOLER – *the underlined*):

S: Face the other **S**quarely

H: **H**ead nods

O: Adopt an **O**pen Posture

V: **V**erbal Following

E: **E**peech

L: **L**ean toward the other

E: Make **E**ye Contact

R: Be **R**elatively **R**elaxed

(www.psych.umn.edu/courses/.../basic%20counseling%20skills.pdf)

Guiding vs. Directing

In life coaching, it is important for clients to take an active role in the process. Clients should be highly motivated and leading the relationship in setting goals, formulating a vision, and strategizing steps of action. This ensures that the progress being made is in the direction the client wishes to go, rather than where the coach thinks the client should go. The coach should walk *alongside* of clients to help them discover their life purpose, and should not take the lead to direct each step (Dik, Duffy, Eldridge, 2009; McCluskey, 2008). An underlying assumption in coaching is that clients are naturally creative, resourceful and whole and as such they either have the answers or can find the answers

themselves, but at times need guidance in how to locate them (Whitworth, Kimsey-House, Sandahl, 1998, p. 3).

Smart Goals

In the first or second session, discuss and facilitate SMART goal development with the client (Rice, 2007).

Once the goals have been developed, the client and life coach can work together to develop a strategy and action plan to accomplish the identified goals (Millard, 2009). Many times clients have a general idea of what their goals are. For example, one might say, “I want to explore new career options.” A SMART goal would take this desire and frame it in a statement like this, “By January 31st I will choose three occupational areas of interest to explore in my coaching sessions.” By fashioning SMART goals that serve the client, the coach can hold the client accountable and celebrate when goals are met.

Meaningful Questions

Coaches have the opportunity to build a strong relationship with clients, to facilitate their life calling journey, and to measure goal achievement by asking questions that invite transparency and discussion. If used inappropriately, however, questions also have the ability to sever the coaching bond. Questions should not be asked in a mode of interrogation, nor should they be pushed if the client wishes to withhold specific information from the coach (<http://www.mediacollege.com/journalism/interviews/open-ended-questions.html>)

Coaches should strive to use open-ended questions that encourage a full and meaningful answer, rather than a closed-ended question that encourages a short or single-word answer. An example of an open-ended question is: How do you see yourself using your strengths in the nursing field? An example of a closed ended question is: Would you be able to use your strengths in the nursing field?

Open-ended questions are also a good way to start a session. Examples of these sessions starters are: What have you done since last meeting? What are you struggling with? What do we need to focus on today? (McCluskey, 2008).

Leading questions, or questions that prompt a specific response, should also be avoided as they generally give false or biased information. An example of a leading question is: Do you get along well with your boss? A better way to state this is: Talk to me about your relationship with your boss. (<http://www.mediacollege.com/journalism/interviews/open-ended-questions.html>)

Questions that Facilitate Balance in a Client's Life

Listed below are several questions, within various categories, that you can ask to assess the level of balance a client has in their life. These questions can be used during the initial assessment phase, as well as when conducting a conversation on the importance of balance or self-care.

“Listen to Others

What are the people around you saying?

Do people expect you to be too busy to take on anything else?

Are people always commenting...I know you are really busy...

What do your kids really think of your job? Do they comment on you working all the time?

What is your spouse saying? (If you already know what he or she would say, but you've stopped listening, that's a real danger sign.)

Listen to your Body

Are you getting enough sleep to wake up refreshed?

Is it tough to motivate yourself to keep working in the afternoon?
Explain.

Are you finding it hard to maintain basic disciplines? For instance, are you shorter with people than you used to be?

Do you need to escape? To you find yourself spending lots of time (especially late at night) surfing the internet, watching movies or playing computer games? (When you don't allow yourself enough down-time, you end up taking it anyway, just in unhealthy ways.)

Listen to Your Heart

Do you often find yourself saying or thinking that you just need to survive the next few weeks or months?

Do you have a life outside of work? If your job ended tomorrow, what would be left in your life?

How many days in the last week did you really laugh out loud?

Listen to your Date Book

When was the last time you regularly took a day off every week, and did not work at all?

When was the last time you got together with a good friend for an afternoon or evening just to have fun?

If you decided to take a whole afternoon off, how far ahead would you have to look in your date book before you could find a time where you could do it without rescheduling something else? Do you like your answer? Why or why not?

Listen to your Legacy

Leaders tend to create followers who are like them, even down to the little things. How would you evaluate your life if your one great accomplishment was that everyone in your company, ministry, or family imitated your lifestyle? (In other words, they had a schedule like yours, friendships like yours, a family like yours, a marriage like yours, took care of their bodies like you, and had a stress level like you.) If that was your legacy, would you be contributing to the human race or harming it?" (Stoltzfus, 2007, p. 1-2).

Facilitate Balance in Your Own Life as the Coach/ Practice Self-Care

Stress in coaching occurs when coaches take *full responsibility* for the progress of their clients. Although each coach has a part to play in the success of sessions, ultimately the end result of a coaching experience will be linked to the work done by the client. To assess the impact of stress on both the personal and professional life, coaches should reflect on these questions: "To what degree am I taking care of my personal needs in daily life? Do I practice strategies for managing stress, such as praying, medication, time management, or relaxation? Do I listen to my family, friends, and colleagues when they tell me that stress seems to be getting the better of me? Am I willing to ask for help when I become aware that I am not effectively dealing with stress?" (Corey & Corey, 2007, p. 59)

There are several possible sources of stress that a coach may encounter. The ability to recognize and avoid these sources, if possible, gives the coach the ability to minimize stress. Sources of stress may include "seeing a more than usual number of clients, not liking clients, having self-doubts about your value as a coach, having professional conflicts with colleagues, feeling isolated from other professionals, over identifying with clients and failing to balance empathy with appropriate professional behavior, being able to leave client concerns behind when away from work, feeling sexual attraction to a client and not receiving expressions of gratitude from clients" (Corey & Corey, 2007, p. 59-60).

Listening/ Paraphrasing/ Reflection/ Summary

Listening is a key component of coaching. If coaches do not truly listen to their clients, a strong relationship cannot be formed, sessions will likely be directed by the coach rather than the client, and the atmosphere of coaching will seem non-genuine and disengaged. A coach can show their client they are listening through three different modalities. The first is linguistically, or through spoken words, phrases and metaphors used to convey feelings. The second is paralinguistic in nature, meaning through the timing, accent, and pitch of words being spoken. The third is non-verbal, including body language and position, facial expressions, and gestures (www.psych.umn.edu). Real listening does not occur when one assumes they know the cause and outcome of a person's story, decision-making, or disclosure. True listening requires that the coach be completely present with their client and that they hold that client with extensive curiosity and compassion.

Paraphrasing and reflecting the verbal content of the client are ways in which the client will know the coach is listening and seeking to understand what they say, rather than just hearing the words being spoken. These terms are similar, and often confused, but serve different purposes. Paraphrasing occurs when the coach rephrases the content of the client's message, whereas reflecting is a verbal response to client emotion. An example of paraphrasing is as follows:

Client- I know it doesn't help my search for a life purpose when I am not doing my daily devotions.

Coach- It sounds like you know you should be doing your daily devotions to help you on this journey of discovering a life purpose.

The purpose for paraphrasing is to convey the coach understands the client, to help the client by simplifying focusing on what they said, to encourage the client to elaborate, and to provide a check on the accuracy of the coach's perceptions. Paraphrasing should be used when the coach has a hypothesis about what is going on with the client and would like to verify if it is right, when the

client is in a decision making conflict, or when the client has presented a lot of material and the coach feels confused.

An example of reflection is:

Client: So many things are going on right now: another hectic semester has started, I've been sick, and my mom really wants me to pick a major already. I find myself running around trying to take care of everything. I'm not sure I can take it anymore.

Coach: You're feeling pretty overwhelmed by all the things that are going on right now.

The purpose of a reflection is to help clients feel understood, as well as to help them express and manage their feelings, and to discriminate among various emotions (www.psych.umn.edu).

A summarizing combines paraphrasing and reflection. Summaries get to the bottom-line of what the client is saying to provide focus. A summary is a collection of two or more paraphrases or reflections that condenses the client's messages or the session. The purpose of a summary is to tie together a client's messages, to interrupt inappropriate rambling, to identify patterns or themes, to start or end a session, to transition to a new topic, and to review progress (Dik, Duffy, & Eldridge, 2009; www.psych.umn.edu).

Journaling

Journaling is a simple technique that gives the client a chance to think through coaching sessions on paper. The client can be given homework to write in the journal, or he/she can be encouraged to process independently in order to gain more insight. Many times the client cannot put into words what is going on inside. By using a journal to write down thoughts, patterns can emerge so that the client and the coach can see what is going on inside the client. Journals are particularly helpful for those clients who are introverted and need time to gather

thoughts before speaking. Individuals who keep journals have higher levels of self-reflection, but lower levels of insight than those who did not keep a journal. (Grant, 2003)

Family Photo

Used to show experiences each member of the group has had. Each group member is instructed to select photos representing experiences, family, or whatever they chose. Each member of the group will take a turn explaining what is depicted in the photos.

Benefit: This exercise helps the members of the group share important pieces of their lives. The group can begin to help each other process the meaning in those pictures by asking questions, making observations, and active listening. Many times this activity helps the group begin to interact in a meaningful way (Sherman & Fredman, 1986).

If I Were/ Sentence Completion

There are several ways this can be used in coaching. The coach starts a sentence and each member has the opportunity to finish it. The answers can reveal what a particular member is feeling in a certain area, or it can lighten the mood of a group. Questions can be asked about the finished sentence.

Example:

If I were a mood, I would be....

If I were a piece of furniture, I would be....

I must....

I wish I could...

If I had the courage, I would....

The best time of my life is when....

(Sherman & Fredman, 1986).

Empty Chair

Place two chairs in the middle of the group. Each group member takes a turn talking to the empty chair. The empty chair represents the person, or people, with whom the group member needs to communicate his/her desires. The group member talks to the chair to practice how he/she feels, or what decision has been made.

Benefit: Empty chair is often used in therapy, but could be beneficial for coaching. Many times making a career decision can be difficult due to the people that have influence in the client's life. Sometimes it is necessary to practice how news will be shared with friends or family. The group can offer suggestions as each of them practice what they want to say (Sherman & Fredman, 1986).

Sculpting

Sculpting consists of positioning people in relationship to each other in a particular setting. In Marriage and Family Therapy it is used to see how different people in the family interact through the eyes of a sculptor. This idea can be used in group to explain a current working situation, or how different influences are impacting the individual as he/she tries to figure out the next step in coaching. This can also be done with clay or play-doh instead of people.

Benefit: It is an active way to working in the group that is not just talking to each other. Sometimes other group members can gain insight for themselves while helping others work through the sculpting (Sherman & Fredman, 1986).

Straw Tower

Divide the group into two smaller groups. Give each smaller group a bag of straws. Instruct the group to build a tower as tall as they can within a certain amount of time. The group is not allowed to talk to each other for the first few minutes. The leader can decide when they can talk. Whoever builds the highest tower wins the challenge. Leader should have a prize for the winning group.

Benefit: This is great icebreaker for groups who need to interact better. The group leader can observe how each member is working with others and tailor the group to meet the needs of the individuals (Sherman & Fredman, 1986).

Antidote Statements

Antidote statements are affirmations targeted at reversing self-loathing statements or negative self-talk. Have clients write down all the negative statements they say to themselves on a piece of paper or whiteboard. Then have the group work together to think of antidotes to write directly beside each negative statement (Michaels, 2010).

Coaching Documentation

The DAP Method

Progress notes are an important piece of a helping profession and have a dual purpose. The first is to provide the best level of care and service to clients. Keeping track of the details of each session allows a coach to organize the necessary details of each client, serves as a refresher for past sessions, and is important to a smooth transition should a client be transferred from one coach to another. Progress notes also make it easier for the life coach to track when the client's goals are being met, and allow for reflection to occur at the point of termination with a client. Second, progress notes keep the life coach legally safe. Emergency situations, such as suicidal or homicidal ideation, should be noted with detail to ensure that authorities understand the procedures that took place to keep those involved from harm. Traditionally, if it is not written down in a progress note it did not happen (Corey, 2005).

Cl= client

LC= Life Coach

Data

Make objective statements. Include statements of importance that were said directly by the client with summarization and quotes. Important information may include comments about the life coaching process, goals for coaching, what was learned from an assessment or activity, etc.

Example: Cl stated she reviewed her MBTI results. Cl is in agreement with reported type of ESFJ. Cl questions concerning workplace report were answered. Cl reported her goal of understanding MBTI results further was met. Cl stated she feels a “continuous leading” to work with elementary age children in education, and would like to talk with a professional in the field for an informational interview.

Example: Cl stated he did not complete his reflective assignment this week due “spacing” the assignment. Cl reported having a “tough and discouraging” week, as his parents called and told him they would be losing their house due to financial difficulty. Cl stated he had not talked to anyone about this news before session. Cl stated he does not know what his goals are for life coaching.

Assessment

Make subjective statements. Assess the session overall, including impressions of the client (engaged, disengaged, avoidant, etc.) Also include what was seen physically, such as affect (blunted, smiling, crying, etc.), and body language (open or closed as evidenced by..., nervous tics, etc.).

If affect, mental status, or thought process was remarkable, discuss here. Remarkable affect includes blunted facial expression or facial expression that does not match the client’s words. Remarkable mental status includes discussion of suicidal or homicidal ideation, or discussion of any kind that leads LC to believe clinical counseling services may be needed. Remarkable thought process includes disconnected or distorted thought patterns.

Example: Cl continues to be engaged in the life coaching process, as evidenced by completing out of session reflection assignments and self-reporting continued goal development. Cl appears to have a good understanding of her MBTI results. Cl smiled as she discussed becoming an educator. Education fits Cl MBTI and IMAGE assessments, as well as Cl personal strengths. Cl maintained open body language, as evidenced by appropriate eye contact and note-taking during session.

Example: Cl appears to be disengaged in the life coaching process, as evidenced by not completing reflective assignments the past two weeks, as well as not having life coaching goals. Cl maintained a closed posture through the coaching session, as evidenced by leaning away from the LC with crossed arms. Cl thought process was scattered as he jumped from one topic to the next, and interrupted this LC to interject comments loosely, or not at all, pertaining to the discussion taking place. For the first 10 minutes of session, Cl scratched his arms and chest. Cl could benefit from seeing a counselor about his family situation. Cl should be referred to Center for Student Success.

Plan

Discuss how life coaching is going to continue. Plan for the next session and place the date of the next session toward end of note. Put date and initials at end of note.

Example: Cl will contact two people in the education field that she could do an informational interview with. Focus on passions next session. Complete passions exercise with Cl. Next appointment scheduled for 5/17/2011 at 9:00 a.m. 5/10/2011 LAS

Example: Cl will contact Center for Student Success this week to schedule a counseling appointment, per LC referral. Obtain signature from Cl on Consent for Release of Information Form next week.

Contact Center for Student Success to verify CL attendance in counseling after form is obtained. Cl will think about life coaching goals. Discuss Cl life coaching goals next session. Next appointment scheduled for 4/22/2011 at 1:30 p.m. 4/15/2011 LAS

Coaching Policies at Indiana Wesleyan University

Life coaches at Indiana Wesleyan University will abide by the professional standards and code of ethics as established by the International Coaching Federation (ICF). This code of ethics can be viewed and downloaded at <http://www.coachfederation.org/about-icf/ethics/icf-code-of-ethics/>.

In addition to these professional and ethical standards, IWU life coaches are expected to follow the policies below when handling issues concerning cancellations, confidentiality, intent to harm, or self-harm.

Cancellation Policy

Purpose of Cancellation Policy: To maintain a consistent set of expectations for coaching standards of practice that will best foster continuity of care and diminish any possible damage to coaching relationship.

CLCL coaching staff will abide by the following procedures if it is necessary to cancel an appointment with their client:

- 1) Life coaches will have any cancellations approved by the Coordinator of Life Coaching via email or word of mouth. Coordinator of Life Coaching will have any cancellations approved by the Assistant Director.
- 2) After cancellation has been approved, inform receptionist that the appointment will need to be rescheduled within the next 5 business days.

If the receptionist cannot find an open time slot within the next 5 business days during life coaching hours, the life coach will be responsible for opening up that time on their calendar.

The appointment will remain on the life coach's calendar as "cancelled" or "rescheduled" for future reference purposes.

- 3) Life coach will personally follow-up with client the day of the cancellation to connect with, apologize for, or explain the cancellation and what will happen as a result.

Confidentiality Policy

Purpose of confidentiality: Establishing a safe environment both in and out of session for the client to explore, discover, and apply information as it pertains to their personal goals and life calling.

The confidentiality policy for the CLCL coaching staff is a combination of confidentiality ethics as used by most helping professions and FERPA standards that our institution must abide by as a whole.

Confidentiality should be discussed with the client during intake while going over their Informed Consent Form.

All information shared by and with a client in coaching sessions or pertaining to their sessions or progress in life coaching will not be disclosed by the life coach outside of a session without the client's written consent.

In the event that a client would disclose intent to harm themselves or others, the life coach then has a duty to inform the appropriate parties (Center for Student Success counselor and Campus Police) as outlined under the *Intent to Harm* policy.

Coaches are permitted to discuss coaching sessions with others on coaching staff for the purposes of consultation or accountability. Information exchanged during these professional dialogues should also not be shared outside of the CLCL without the client's written consent.

Should another office on from the educational institution request basic information about your client's account (i.e. if they have been seen for coaching, name, major, ID, etc.) such information can be shared without the client's written consent. However, if this information is requested by anyone outside of university faculty or staff (i.e. parents or friends), you CANNOT share that information with them without the client's written consent.

If another office on the IWU campus requests information about the content of your coaching sessions or more personal details about your client, you must obtain written consent from your client before sharing that information.

If written consent has already been obtained by the requesting party, then you must receive a copy of the form for the client's file before consulting or sharing information on the client.

Many complications in confidentiality and dual relationships can present themselves when you coach a client in the same environment that they live, eat, study, work, and oftentimes worship. When encountering a client outside of session, it is completely appropriate for the coach to acknowledge them on a personal level and discuss their general well-being and daily happenings. However, even in these situations, coaching sessions, content, assignments and

any other information related to their progress in life coaching should not be discussed.

If the client brings up information pertaining to their life coaching process outside of their life coaching sessions, the coach can gently redirect the conversation and inform the client that they can discuss those matters in session.

Intent to Harm

Purpose of Intent to Harm Policy: To protect the client and any others from personal, physical harm and to protect the life coach professionally should a harmful event occur.

While treatment of mental health or therapeutic issues is not within the scope of practice for life coaches, students will often share deeply personal information with their life coaches both about their life's joys and distresses. In the event that a client discloses intent to harm themselves or others, a life coach employed in the CLCL will abide by the following protocol.

Self-harm

(examples of self-harm include disordered eating, cutting, burning, or in other ways mutilating or abusing oneself physically)

- 1) Coach will inform the client that they want to help and that they take any threat of harm very seriously.
- 2) Coach will inform student that this is an issue in which the coach must break confidentiality and share the client's struggles with other qualified professionals. Coach will also inform client that they cannot continue life coaching with the client until they are certain that the client is safe and receiving help and support from other resources, such as the Center for Student Success and Residence Life staff.

- 3) Coach will lead the student through filling out a “No-Harm Contract” for our records and make a copy for the Center for Student Success (CSS).
- 4) Coach will then contact the CSS (ext. 2257) to inform them that the coach and the student will need to speak with a counselor immediately. Ask for the Coordinator for Clinical Counseling first. If he is unavailable, request another counselor on staff. Disclose with the counselor what has happened and that you will be bringing the client over immediately.
- 5) Coach will personally walk client over to CSS (located in Student Center 220) and will stay with client until transitioned to a counselor within CSS.
- 6) CSS counselor will then take care of any other communications that need to take place.
- 7) Coach will immediately document what words were exchanged, what actions were taken, and who the client is currently with.
- 8) Inform Coordinator for Life Coaching of the event and your actions immediately after documentation.
- 9) Before seeing the client for additional life coaching sessions, coach will speak with CSS counselor to determine readiness to re-engage in coaching process.

Suicidal or homicidal intent or intent to harm a minor or the elderly:

- 1) First contact Campus Police at 677-4199.
- 2) Then follow procedures 1-9 as outlined above. Do not leave student unattended.

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