Peer Coaching in Government: A Set of Case Studies

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The co-authors of this article have all been involved in a major organizational coaching program in a Canadian territorial government. Governments throughout the world typically face uncertain futures with regard to the funding of innovative programs, such as organizational coaching. This uncertainty can be at least partially confronted, as it was in this government, by training peer-based coaches who can continue to provide services even if funding is no longer available for this program. Furthermore, though collaborative efforts involving leaders from outside government, who have served both as coach trainees and practicum clients, this government was able to bridge the chasm that often exists between a government agency and the public it serves. The three peer coaches who have prepared case studies for this article describe what it is like to coach for the first time and what it is like to engage their client/colleagues in an appreciative, yet challenging manner as an organizational coach.

Coaching in government is not easy for many reasons. One of the reasons concerns the uncertain funding for virtually any “innovative” program in government. Unless those who lead the government are assured of job securities (as in a dictatorship or monarchy), there is no sense of longevity, let alone permanence, in the funding of new initiatives. A new leadership development program is funded until there is a new election and a new party comes into power. The leaders of this party want to “brand” the government they now control with a new image. They certainly don’t want to retain remnants of the old regime that they successfully defeated. As a relatively new and often controversial strategy for organizational improvement, coaching is among the leading candidates for extinction when a new set of leaders come into office.

What can be done about this challenge? Obviously, those who are administering the coaching program can become good “politicians” themselves and persuade the new leaders that this is an effective strategy. They can give it a new name and create a fiction that this coaching initiative is actually part of the “new look” in government being brought in by the new party. All of this, unfortunately, smacks of deceit and multiple conflicting agendas—which is not a very health environment in which to nurture an organizational coaching relationship.
There is an alternative strategy. One can build an organizational coaching program that is not dependent on governmental funding – one in which members of the governmental organization coach one another, as peer coaches, or in which there is exchange of services between government and outside agencies (for example, corporation x will provide a certain amount and type of coaching for government y, in exchange for a comparable amount and type of coaching services being provided by government y to corporation x).

I [William Bergquist] have had the joy and privilege of helping to design and implement a peer-based coaching program that exemplifies this alternative response to the funding challenge. This program was established by the Government of the Yukon (YG) in Canada, under the exceptional leadership of Richard Wale and Cheryl von Blaricom (Staff Development Branch of YG). Men and women inside and outside YG have been trained as organizational coaches for the past seven years, and the central features of this program have been described in previous IJCO articles, written by Richard Wale (2004) and myself (Bergquist, 2004).

In the present article, I have invited several of the participants in this program to present their own description of what happened in their initial engagements as peer-based coaches. I believe that the insights they offer are quite refreshing and revealing of the distinct dynamics operating when a newly-trained coach engages in her first coaching relationship. We have offered many articles and case presentations in IJCO that have been written by senior practitioners in the field. In the present article, the case presenters offer insights derived from the other end of the coaching experience spectrum. The three cases being offered in this article were written by two women and a man who are accomplished and experienced in their own fields of expertise. Their existing skill sets overlap to varying degrees with skill sets associated with coaching. In each instance, they find that organizational coaching is an exciting and fulfilling process and they wish to continue engaging in this peer-based program. In addition, they have begun to make use of coaching strategies in their ongoing work as managers, human service providers and members of teams both within and outside YG (an obvious secondary benefit of effective peer-based coaching programs).

**BACKGROUND**

In setting the stage for the three case studies, I will briefly point to and describe several of the coaching strategies and tactics contained in the training program to which the case presenters refer. In many instances, I have previously written in much greater depth about a specific coaching strategy and tactic in an IJCO article and provide a reference to this IJCO article for the
reader who wishes to know more about this element in the coach training program.

**Focus of the Training Program**

It is important to note first that the training program focused on strategies associated with executive coaching. As John Lazar and I have noted (Lazar & Bergquist, 2007), this refers not to coaching at a specific (“executive”) level of an organization, but instead to coaching with any member of an organization who faces the challenge of making decisions (the “executive” function) under conditions of complexity, uncertainty and turbulence (Bergquist & Mura, 2005). While the training program touched on strategies associated with performance coaching (a focus on behavior) and alignment coaching (a focus on underlying values and aspirations), primary attention was directed to work that is done at the level where cognition (thought) and affect (emotions/feelings) interweave—work that is done by the client when confronted with a difficult decision.

Inside the executive coaching strategy, we focus on three primary sub-strategies (Bergquist, Merritt & Phillips, 2004):

1. **reflective coaching:** assisting the client in reflecting on their own internally-based information, intentions and ideas (anchoring this reflection in questions such as: how do you know, what do you want to achieve, what solutions have you already considered, why is this the case, why do you want to do this, why is this a good (or bad) idea, and if you could then . . . ;

2. **instrumented coaching:** expanding the client’s perspectives by gathering data from and deliberating about data from self and other people, based on both descriptive analyses (using instruments such as the MBTI) and normative analyses (using instruments such as 360° feedback inventories);

3. **observational coaching:** expanding the client's perspectives by observing and providing feedback to client when she is operating in her work place or in a simulated leadership laboratory.

The specific training program I conducted (with my colleague, Kathleen O’Donnell) in YG tended to focus on reflective coaching, with a secondary emphasis on instrumented coaching. Observational coaching is hard to implement in any organization, until such time as ample trust has been built in the organization and a “coaching culture” has been established based on widespread acceptance of the benefits associated with organizational coaching (cf. O’Neill, 2007).

**Appreciative Perspective**

The YG program, like many that I lead, builds on something that I call an “appreciative perspective”. Making use of

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concepts associated with the very popular and successful organization development strategy called “Appreciative Inquiry” (AI) (Srivastva, Cooperrider & Associates, 1990; Bergquist, 2003; Whitney & Trosten-Bloom, 2003; Cooperrider & Whitney, 2005; Bushe & Guest, 2007; Meyer, Donovan & Fitzgerald, 2008). I tend to emphasize the use not only of AI but also related strategies associated with Chris Argyris, Donald Schöon and Peter Senge (Argyris & Schöon, 1975, 1978; Argyris, 1989; Senge, 1990). These strategies tend to emphasize critical reflection upon one’s own assumptions, beliefs and values (closely associated with reflective coaching processes), as well as critical reflection on organizational issues that are multi-dimensional, filled with dilemmas, and subject to influential forces over which the client has some, but not complete, control. John Lazar and I (Bergquist & Lazar, 2008) have described these as organizational problems, in contrast with organizational puzzles (that are uni-dimensional and under the client’s control) and mysteries (that are profoundly multi-dimensional and not under the client’s control).

I have found that organizational problems are particularly prevalent when working with YG (and other governments), as well as leaders of the Native (First Nation) communities in the Yukon (Pelchat, 2006). Furthermore, the issue of internal versus external locus of control is particularly important in government, there being a tendency for governmental administrators to assume an external locus of control. All of the ingredients are there for an external locus: governments are inevitably big organizations; they are usually quite bureaucratic; and there are unpredictable shifts in policy with a new party in power (this shift is particularly difficult to predict in a Parliamentary governance system such as exists in Canada and many national governments in the world).

Another part of the appreciative perspective concerns ownership of the coaching issue. Does the client own the issue (keeps the “monkey” on her shoulder) or does the coach take over ownership of the issue (allows the “monkey” to jump onto his own shoulder) (Oncken & Wass, 1974)? This issue of managing the monkey is particularly important for peer coaches to address, given that they are accustomed to taking on the monkey as conscientious, dedicated government employees. As part of the appreciative strategy, I encourage peer-coaches to engage a process (borrowed from Argyris and Schöon) called “advocacy-inviting-inquiry.” As noted in an earlier IJCO article (Bergquist, 2008), I have expanded on Argyris and Schöon’s initial “advocacy-inviting-inquiry” process, by suggesting several ways in which a coach can not only offer advice (advocacy) which encouraging dialogue about this advice (inviting inquiry), but can also use other modes of advocacy (such as describing a comparable experience in the coach’s own life) that precipitate thoughtful and constructive inquiry and dialogue between client and coach.
The Case Studies
Having offered these summary descriptions, let’s turn to the actual case studies. In each instance, the description is being provided directly by the person serving as a coach during their “training” period. They wrote full case studies as a requirement to receive a government-approved certification in coaching from the graduate school where I serve as President (The Professional School of Psychology). I have excerpted the briefer descriptions offered in this article from the much fuller case studies; together with the case study author, I have also made some modifications in the case to protect the anonymity of the person receiving the coaching. In the first two cases, we also have included comments made by the person receiving the coaching services (a rarity in case study reports).

I invite you to savor the reflections of these peer coaches as they experience their first moments of “doing” organizational coaching. For those readers who are experienced coaches, these case studies might bring to mind your own first moments of coaching. For those who hire coaches or train coaches, these case studies might provide you with insights regarding the strengths and weaknesses associated with use of “new” coaches and with the establishment of peer-based coaching programs—particularly within governmental settings.

CASE STUDY ONE: JENNIFER ELLIS
Over the course of a five month period (December 2003 to May 2004) I met with my colleague, who I will call “Rebecca”, a total of eight times. Below, I summarize the focus of each meeting and highlight the key coaching strategies used in each session. I follow this with my own reflections on what worked well in this coaching relationship and what I learned during the process. The article concludes with words from my colleague.

Session One: Contracting
In our first session we discussed Rebecca’s goals for the coaching relationship and other details relating to how often we would meet, where we would meet, how we would deal with note taking and other contracting topics. This stage went smoothly. We chose not to sign a contract as we were both comfortable with a more informal arrangement and felt that we had adequately articulated how we wanted to approach the coaching process.

Primary Goal for coaching work: To explore long-term career directions and possible changes following a planned leave from work of many months. Secondary Goal: To deal with current work related issues as they come up.

Session Two: Reflective Coaching
In this session we focused on a specific work issue Rebecca
wanted to explore. The issue centered on how to ensure active
First Nation involvement in an important planning initiative
in her department. While letters of invitation had been sent to
First Nation leaders, no confirmations had been received for an
impending meeting. There were potentially significant political
ramifications to the lack of First Nation participation.

Strategies and assumptions: In this coaching session we focused
on clarifying the problem (i.e., gathering information), identi-
fying what success would look like, and exploring ideas for
moving forward. Rebecca articulated the problem and clarified
what success would look like. I helped her test her assumptions
about this view of success by working with her to explore the
risks and opportunities of doing nothing and of possible best
case scenarios. This approach helped get a full spectrum of
possible solutions on the table. I also asked Rebecca to identify
any successful strategies she had used in the past to address
similar issues (e.g., a lack of response from First Nations). The
assumption behind this appreciative approach was that Rebecca
already had the tools and knowledge to address this situation and
just needed a sounding board to work out a solution.

One of the greatest challenges in this session was fighting the urge
to provide advice to Rebecca on how to address the situation. My
knowledge of the players and issues made it difficult for me not to
jump in with solutions, particularly when Rebecca asked me what
I would do in this situation! I struggled to reframe my ideas as
advocacy inviting inquiry by describing a possible approach and
then asking what would or would not work if this approach was
applied to her situation. By the end of this session, Rebecca had
identified two concrete actions she intended to take to achieve
success on her issue.

Session Three: Reflective Coaching

At this meeting, we reviewed strategies that Rebecca had applied
in the work situation discussed at our last meeting. We talked
about what had worked and discussed follow-up strategies to
ensure ongoing First Nation participation in the consultation
initiative. We clarified the techniques that worked and reviewed
how she may apply these approaches to similar challenges in the
future.

Strategies and assumptions: The primary strategy in this session
was to use an appreciative approach to help Rebecca focus on
the approaches that had worked well in this particular situation
and to reaffirm how this learning might be applied in future
situations.

Rebecca also discussed a particular situation involving one
group’s lack of trust of the Minister of Rebecca’s department.
I encouraged Rebecca to put herself in the group’s shoes to help
her articulate their specific concerns and then to identify solutions for each concern. The assumption was that this approach would help Rebecca step away from her own perspective, and those of her department, so that she could focus on understanding the perspectives of this group. This helped separate the step of problem identification from the steps of identifying and testing possible solutions.

At two points in this session I also used advocacy-inviting-inquiry as I offered a possible solution (using a third party to help build trust, and forming a working group) and asked her how this solution might work or not work in the situation she had identified. This approach seemed to work well with my colleague as she understood the technique. She was also someone who was very willing to test all ideas and to voice any concerns she may have with a particular approach.

Session Four: Reflective Coaching

It wasn’t until our fourth meeting that Rebecca and I focused on her primary goal. We discussed her satisfaction in her current job, positive experiences in the past and thoughts and desires for the future.

Strategies and assumptions: I began by focusing on why Rebecca had set the goal of exploring future career directions in the first place as I wanted to learn more about the motivation behind her decision (information seeking). This helped to increase my understanding of why she felt this issue was important. It also seemed to help her clarify what had brought her to this stage.

We explored the aspects of Rebecca’s current and past work that she appreciated and valued. I used some “what if” questions to help Rebecca articulate her level of satisfaction with her current work. For example, What if you weren’t going on leave for many months? What if your job wasn’t there to return to after your time away? What if you were 18 again – what would you change or do more of? These questions helped to further clarify the “problem” Rebecca wanted to address. Was it simply career focused or something broader?

We continued this line of questioning by exploring a “wish list” of things Rebecca would like do while away on leave or after returning to her job (e.g., doing a Masters program, taking music and cooking lessons, traveling more, becoming self-employed). The intention was to gather all of the ideas she had been considering in one spot and to open the realm of other possibilities, without judgment, before starting any analysis of the options.

Session Five: Reflective and Instrumental coaching

Prior to this session, Rebecca had provided me with a copy of her Meyers-Briggs results and a 360° leadership survey that had been
completed about a year earlier. We talked briefly about the 360° results and how the work context at the time may have impacted the perspective of those surveyed about her leadership.

Our discussion of her 360° in this session was preliminary. We soon turned to a review of our discussions at the last session and spent the rest of the time talking about alternative jobs that she would might find rewarding – and why.

**Strategies and assumptions:** Summarizing the previous meeting ensured I had correctly heard and understood Rebecca’s ideas and concerns. It also served to reaffirm the key items that Rebecca appreciated about her work. I asked questions about the range of jobs that Rebecca had done or had considered doing in her professional life. We then explored what it was about each job that appealed to her. This helped to identify which elements of a job were most important to her (for example: an ability to affect change; continual learning; working with others she respects; low risk; and variety). The assumption behind this approach was that many of us do not consciously name what is fundamental to us in our work. By helping Rebecca articulate this list, I believed it would provide her with a tool for assessing her current and future work opportunities.

**Session Six: Instrumented Coaching**

In this session, we focused on the results of Rebecca’s 360° survey and discussed action plans that could help Rebecca strengthen particular leadership qualities.

**Strategies and assumptions:** In reviewing the 360° results, I asked Rebecca to focus on a couple of areas where there was a significant discrepancy between her self-assessment and the assessment done by others. We explored why these differences may have arisen and whether she felt they accurately reflected her leadership qualities. It was assumed there was more opportunity for learning in these areas of discrepancy than there would be in areas where Rebecca’s self-assessment was consistent with that of others.

We then compared Rebecca’s 360° result to the leadership qualities identified by the Yukon government as qualities that should be fostered in the public service. Rebecca identified which of these leadership qualities she felt would be valuable for her to work on. We explored why these were important and identified where she felt there were notable gaps between her current and desired practice. We concluded by looking at the action plans in the “Leadership Effectiveness Analysis” materials for each of the targeted leadership quality areas. Rebecca identified actions from these proposed plans that she felt she could reasonably work on to build her strengths in these areas both immediately and during her leave from work.
Session Seven: Reflective Coaching
Rebecca wanted to discuss a specific work concern in this session. We explored Rebecca’s proposed plans for bringing different parties together to discuss a business plan for a major departmental initiative.

Strategies and assumptions: Rebecca first described the problem and her initial idea for bringing the parties together. I asked Rebecca to suspend judgment and come up with a number of other potential ways the parties could be brought together if she had all the time and money she needed. This “what if” approach helped Rebecca identify a few different approaches.

Rebecca was then asked to explore the strengths and weaknesses of each possible approach. The assumption was that by removing barriers of cost and time, the imagination would be freer to come up with innovative approaches to an old problem of bringing diverse parties together. Although some of the new ideas were impractical as a whole, they highlighted some elements that would be useful to integrate into any solution to the problem (e.g., individual meetings with the parties prior to a collective meeting). Rebecca ended up revising her original strategy by integrating some of the elements from the “what if” ideas she had come up with.

Session Eight: Wrap-Up
In preparation for this session, I prepared a written summary of the key points related to Rebecca’s primary goal that we had covered in our coaching sessions. I also outlined the actions Rebecca had identified she would like to take before she went on leave and in her time away. We reviewed this summary together and talked about what Rebecca’s definition of success would be for her leave.

Strategies and assumptions: As we had not shared any notes on our sessions to date, this summary and action plan provided a concise review of the learnings related to Rebecca’s primary goal. It gave her a concrete action plan to work on as well as a list of priorities she could review if and when she wanted to consider a change of employment in the future. The review of these items during this last session provided a sense of accomplishment and of closure to our sessions.

Best Approach
I think the best approach I used in this coaching relationship was the “what if” type questions. These opened up the door for more creativity and a judgment-free exploration of ideas; I found this helped Rebecca get to the heart of what was important to her in a positive manner. It also was enjoyable for me to take an approach that focused on positive options rather than looking at what wouldn’t work.
Relationship between Successes and Strategies
The relationship between successes and strategies depended in part on which goal we were working on. For Rebecca’s primary goal of exploring long-term career directions and other changes in her life, the strategy of appreciate inquiry seemed to work well as helped Rebecca articulate and reaffirm what was important to her in her work and to review the strengths she could bring to any position. Using “what if” questions was also a very useful strategy as it allowed Rebecca to explore the essence of what she was interested in pursuing without limiting herself with concerns about practicality (e.g., What would you do differently if you were 18 years old again?).

For Rebecca’s secondary goal of addressing work-related concerns as they came up, the approach of advocacy inviting inquiry seemed to work well. Rebecca has an analytical mind which helped her identify the strengths and weaknesses of possible solutions and to pull out the elements that would work well in her situation.

Additionally, using an appreciative inquiry approach to focus on what worked well in the past to address similar challenges (such as getting First Nation representatives to attend an important workshop) appeared to reaffirm which approaches would work best for Rebecca. This act of stepping back to look at other situations seemed to take away extraneous information (such as the meeting topic and timeline) and focus on the basic steps needed in all similar situations (such as talking to co-workers for contacts and making personal contact with people within First Nations actively working on related issues).

Lessons
1. Puzzle vs. problem. The challenge of the first coaching session (meeting #2) was that the issue of involving First Nations in an upcoming departmental initiative appeared to be more of a puzzle than a problem to me at first. However, upon further reflection, the reason it appeared to be a puzzle is that there seemed to be a simple straightforward solution, in my mind. Yet, upon further discussion, it became clear that the issue had more than one possible solution and the outcome was of significant importance to a number of stakeholders. The lesson for me was to avoid jumping to my own conclusions about the range of options available to deal with an issue.

2. Value of holding back. Another lesson involved the challenge of not jumping in and providing advice to Rebecca on some of her work-related challenges. At times I wanted to rattle off many ideas about how to address her concerns, but found that holding back and asking “what if” or other reflective questions allowed Rebecca to identify her own solutions. Often these were similar to what I had wanted to offer up but there was
greater value in allowing my colleague to arrive at these conclusions using her own tools.

3. **Strength of “what if”**. Early in our sessions, I used some “what if” questions. I found that letting go of the day-to-day, and dreaming about what might happen if the world was completely different, helped to highlight the core elements of what was important to Rebecca in her work and life (e.g., What if you were 18 again? What if you didn’t have a job to come back to?). It was interesting and rewarding to watch how these apparently simple questions quickly brought out the core issues.

4. **Value of note-taking and reflection.** At each session I took notes as we talked for my own benefit, to help me track what was said and done. After a few of the sessions, I spent another 10-15 minutes reviewing the notes from our meeting and writing my own observations about the strategies I felt had worked, any challenges I faced in the coaching role and some possible approaches for the next session. While my notes were a valuable tool for summarizing key points for review at our next meeting, I found the greatest value for my own development was the time spent reflecting on and documenting what did or didn’t work.

**Words from My Client**

My experience as the client in this executive coaching arrangement was very satisfying. From my perspective Jennifer demonstrated a good grasp of the coaching concepts and was very effective in using them. I particularly recall the “what if” questions being very helpful to open up how I was looking at a particular issue and help me consider a broader range of ideas. I remember the “light bulb” going off for me in a few of these situations.

Being familiar with Jennifer’s professional background and expertise I know that she could have easily slipped into “consultant” mode in a few of our discussions, however, she was very cognizant of her role as a coach as opposed to a “consultant” and always maintained her boundaries in that regard.

**CASE STUDY TWO: MONICA BARR**

Daniel and I met while attending a training program. We were in a small group together and I was thrilled when he agreed to be coached for my practicum. He was young, and a new Government employee. I believed I had a lot to offer him because of my years of experience with young people and time with YG. I also felt compassion for him as a young person entering the political maze of YG. He had obviously observed me throughout this class, so I felt pleased that he would want me for a coach. I believe all new YG employees should be offered a coach as part of their orientation to government.
Daniel works for the Finance Department at YG. His previous work history was with high risk youth so we also had that interest in common. As Daniel is an ESTP and I am an INFJ, it provided us with an excellent opportunity to discover aspects of our opposite Myers-Briggs Type.

**Session One**
During this session, Daniel described his job and his responsibilities. He outlined what he hoped to gain from the coaching sessions. He did not require any instrumental coaching because he had already done this as part of his position. He wanted someone to vent to, with whom he felt safe and who had nothing to do with Finance. He wanted to share his workplace issues with someone he trusted because he was a new YG employee. We decided we would meet every couple of weeks, with Daniel initiating the time and place. I assured Daniel our conversations would be kept confidential and told him how pleased I was to be chosen as his coach.

**Session Two**
Daniel spoke of his boredom at work which resulted in his creating a new financial data base system for his area. He was concerned about not having enough work to do. He spoke of his dilemma regarding his difficulty with addressing the issue of his lack of work with his supervisor because he was concerned it would negatively impact their great relationship. This was an issue for Daniel because of his strong work ethic. He felt he was not producing enough work.

**My coaching input.** I helped him reframe his situation to view his positive relationship with his supervisor as an open door to allow him to be honest about his wanting to do more. Daniel’s type wants to take action and get things going. We discussed how he tends to place high expectations on himself and he needs to ease up on the pressure he places on himself to perform. At the end of the session Daniel seemed ready to approach his supervisor and discuss the issue. I used Reflective coaching and some what and how questions to assist him.

**Session Three**
This session focused on Daniel’s concerns regarding how his coworkers were reacting/perceiving his performance. Daniel was continually in meetings. He worried that he was not doing enough actual work. He was feeling like he did not fit in with the staff group because of his age and they had made some comments regarding this as well as his clothing style. He said they laughed at him at a staff meeting. Daniel spoke of his fear of speaking at a staff meeting and his fear of speaking to the Director of Finance. He was worried about having to do a small presentation at his next staff meeting.
**My coaching input.** It was important for me to “Hold the space” for Daniel while he spoke at length of the issues bothering him. After he had finished, I first focused on the issue of his age. I used an appreciative perspective and outlined the benefits of young people entering government. Daniel is an “ST” so I gave him some logical, positive feedback. I assisted him in viewing the matter through a different lens - looking at how his department was investing in him with so much training because they recognized his potential, as I had the first time I met him. He was in the “Grip” so I felt he needed to be reminded of his strengths. I also discussed facts which are important to an “ST”. YG is an aging workforce; look at how many initiatives YG is engaged in to address this issue. I used advocacy-inviting-inquiry throughout the session to provoke dialogue and build trust. I felt it was important at this stage of the coaching process for Daniel to gain confidence in my ability to help him sort out the issues he was presenting. Being an ESTP, he was experiencing his Inferior Function, manifesting as doom and gloom and mentally giving up, and reading negative implications between the lines. He was feeling underappreciated because of his age. I used alignment coaching to address the values and ethics issues and his aspirations. I offered a different perspective on his coworkers laughing at his comments. I suggested how refreshing he would be in that office with his youthful open response. We discussed the different values of different generations. I gave him positive feedback on his strong work ethic. We brainstormed and role played ways for him to speak with his director. He wanted to skip/call in sick for the next staff meeting to avoid the anxiety of having to present in front of the group. For this issue I used “Laser Coaching.” I coached him to “not call in sick”, “not to skip the meeting”, face his fear and see it as a practice run. The more he does it the more comfortable he will become.

**Session Four**

Our discussion began with a focus on his second job as the Executive Director of Second Family (an after-school program for pre-teens). This is a half time position. He shared some problems he was experiencing balancing both positions. He wanted to put in his notice at Second Family; however, he was feeling personally responsible for letting down the organization by leaving. He was also concerned about having to fire a staff member for his poor performance. We also talked about strategies to increase his confidence to speak to his Director of Finance about the Masters Program he wanted.

**My coaching input.** I used some alignment and executive coaching during this session. There were clearly some “Problems” to address. We talked about the reality (what is) and balancing it with the ideal (what could be). I used reflective coaching with what, how, and if questions to help Daniel clarify how holding...
these two jobs was impacting him and what his life would look like if he only worked one full time job. With Daniel being an “ST”, I knew he required a “reason” to change and he needed to see a personal benefit in changing. I used Appreciative Inquiry with open ended questions to help him review and clarify what he wanted. We discussed “Locus of Control”, what is his responsibility, and in his control, and what is not, with regard to the issue of letting the organization down by leaving. I used an “Appreciative Perspective” to help Daniel find the courage to speak to his “Director”. I also used reflective coaching questions (what, how and if).

**Session Five**

Daniel presented as stressed and in the “Grip” during this session. There had been a break in at Second Family. He was worried that he could not submit his resignation as planned previously because it would look like he was deserting the organization while it was in crisis. He was also angry with himself for not firing the staff person who had the performance issues in the past because he was the one who left the window unlocked, allowing easy access for the break in.

**My coaching input.** It was obvious to me, after holding the space for Daniel and witnessing his issues that I needed to focus on helping him determine what is in his control and what is not. One of the stressors for ESTP types is an “inability to control circumstances.” I knew that because of his strong work ethic he was taking on too much responsibility for things out of his control. I used Reflective Coaching questions (what, how, if) to assist him.

I practiced some executive coaching to assist Daniel in following through with his plan to resign from the position at Second Family. He was very tired due to worrying and not sleeping. I helped him develop a plan for bringing himself back into balance by taking care of himself and doing something he enjoyed over the weekend. We talked about how these work choices fit into his life plan.

**Session Six**

Daniel spoke of his concern regarding gossip in the workplace. He had made it a point to maintain professionalism since beginning his position at Finance and was upset with how some of the staff was behaving. He did not want to be drawn into the negativity. He had sent his application to the Masters Program and was pleased to learn he could do it as part of his work day.

He had put in his resignation at Second Family, and he felt relieved and excited about how he could broaden his horizons without so much of his time dedicated to work. He spoke of
plans for his leisure time. He was happy because he only had one day of training the next week.

**My coaching input.** I helped Daniel make the link between the office gossip and how it created Workplace Stress for him. I used an Appreciative Perspective for the session, giving Daniel positive feedback and validation for his behavior and choices. I focused on his strengths and competences. We discussed his life plan and I commended him for “investing in himself and his future.” Daniel is an “ST”, so I validated the personal benefits that he had received through his recent choices. I gave him positive feedback for taking the step to speak to the Director regarding his Masters Program. I validated the contribution he made by not participating in office gossip.

**My Learning as a Coach**

**One.** It was a challenge for me to do Reflective Coaching. Asking so many questions seemed nosey to me at first. I realize the purpose of the questioning and how valuable it is as an effective coaching tool.

**Two.** I do respond to and interact with different people differently. I value being authentic and present during my interactions and coaching gives me the opportunity to practice this.

**Three.** I focus on the big picture – taking risks with innovative ideas and future possibilities. I must be cautious not to place my values on the person I am coaching.

**Four.** This practicum helped me understand how beneficial Myers-Briggs Type Information is as a coaching tool, both to help me respond effectively to the other person’s issues and to understand myself.

**Five.** I must resist my natural inclination to “Laser Coach”. I need to let people muddle through the issue while coming to their own conclusions. I must resist my desire to rescue them and give them solutions.

**Six.** I enjoy “holding the space” for others. It is easy for me to go where they want to go. I have strong listening/attending skills. I’m not concerned about packing the monkey – I know where it belongs.

**Seven.** I remained conscious of the energy flow during the sessions. I was able to interject humor throughout. I like to make others laugh.

**Eight.** I believe coaching is leadership and leadership is the offering of a non-anxious presence. My leadership style is relationship-centered versus task-centered. I see myself as a reluctant leader. I prefer to use the individual or the group/team and draw out their strengths and decision-making ability. I most enjoy the people I am responsible to lead, more than the administrative duties of leadership.

**Nine.** I am an INFJ. Learning about my type validated what I know of myself. In *Introduction to Type and Coaching*, Krebs-Hirsh
(1998) describes my type as “Oracle for People.” I provide people with insight, sometimes reaching clairvoyance, especially about what matters to people. This helps me understand why I am inclined to “Laser Coach.”

Ten. When I was overwhelmed with my work responsibilities, I would take the time to prepare mentally for my coaching sessions. I used self-talk and prayer to assist me in being present for my colleagues during the coaching session.

Currently I do coaching off the side of my desk. If I had my way, I would do it full time. I am in my element when I am coaching someone.

Comments from the Client
Monica and I met during the first classroom component of a specific training program at YG. I realized during those few days that Monica would be an excellent coach. We had our first meeting in November and have met numerous times since then. I began my employment position with the Yukon Government in September 2007. Therefore, I was very new to this position and government in general when I began my sessions with Monica. I had been the Executive Director of Second Family of Whitehorse for just over a year and was continuing to work in that employment position as well as my position in Finance. Monica also works in the youth field, so it was a natural fit to discuss both of my employment positions during our coaching sessions, although we did focus on my Government position with Finance.

Our sessions have focused on a variety of things, all of them extremely helpful and beneficial for me. We have tried to focus more on my government position and have discussed issues such as workload, over-extending myself, ways to feel more comfortable as a young new employee to my office, communicating with high level government employees, ways of coping with stress in the workplace, and strategies for approaching my supervisor with requests. Most importantly, coaching sessions offer me a safe space to voice concerns that I have regarding work and to vent to someone that I know I can trust and who will offer me productive advice.

Coaching sessions with Monica have helped me through many difficult and challenging situations at work and I am happy to say that taking Monica’s coaching advice has greatly paid off for me. I have been able to make decisions at work that otherwise I never would have thought about.

CASE STUDY THREE: MATTHEW SCHENCK
I began my practicum in December, 2006. Throughout the coaching training I found the material of revolutionary interest.
I strongly believe in the foundational principles of coaching, the principle that a coach is a guide or mentor, that a ‘coach’ in terms of transportation, moves you from one place to another, and that indeed this parallels the role of a life coach or executive coach. I particularly identify with the appreciative model, finding and supporting what the person is doing right. These principles nicely mesh with some of the foundational principles of my profession, occupational therapy. First, both human service activities are client centered. The client decides what is most important to work on and takes an active role in rehabilitation (and coaching). Second, there is a focus on the meaningfulness of the activities in which the service provider and client are engaged. The therapist and coach both help a client identify those activities that are most likely to ensure success (as defined both by the service provider and client).

The practicum was set up by a third party until both myself and the coachee were agreeable with starting the relationship. I began by describing the field of coaching and my background. This included setting out guidelines for confidentiality, termination could be initiated by either party “without cause”, cancelling or postponing of meetings, and frequency and length of meetings. The latter we decided to start at one hour every two weeks and re-evaluate after a few sessions. We then set up some expectations in terms of outcomes, but we did not specify timelines.

Through this process we divulged our respective Myers-Briggs personality types. As we were quite similar, we were content to allow a lot of free-flowing conversation with little structure. It was agreed that this would allow the direction of the coaching to follow the thread of issues brought up by the person being coached.

**Session One**

During the first session, the coachee, who I will call Cheryl, discussed health issues and how she felt these related to her job. Her principal desired outcome for this coaching period was to gain clarity for decision-making around staying in her position at work or making a change. I asked mostly open ended questions, and it became clear that there had been a lot of changes in her organization, high workloads, and a very significant conflict with a supervisor. At this point the conversation seemed to be heavy, the situation somewhat dismal.

To reframe, I asked questions like “In your best years/days in this position what was it like for you to get up and go to work?” and “During this time, what parts of the day or job did you really look forward to?” This allowed the conversation to become more positive. Qualities of an organization that Cheryl needed to have in order to be happy in a position began to materialize, such as synergy, productivity, and support from upper management. With
these qualities in mind we then looked at what options Cheryl thought she had. These included a couple different positions within the organization as well as a complete change involving going back to school. We listed these and then explored what it would be like go down each of those paths, to try to actually feel it. Feasibility of these options was intentionally left out. My job at this point was to let her describe her options and then reflect on her feelings, and I would then state what I saw/felt in terms of body language, tone, and so on. It was clear that the position which she described as a “pressure cooker” with long hours afflicted her in a negative way. She contracted and virtually shuddered as she spoke. We ended the session with a brief summary and I suggested that next time we would look at what energizes her and what drains her.

**Session Two**

Energy-giving entities, from leisure activities to work processes to types of interactions with people were listed. Draining entities were also explored. I then posed the question, “Why do you work?” The answers to these questions provided rich information about how both activities and physical, cultural, and social environments influence her. However, there did not appear to me to be huge revelations for her. She had thought through many of these questions previously, and she had already made some plans, though no solid timelines had been established. The plan to go back to school was most in line with the activities that she stated brought her energy and contentment.

**Session Three**

We began this session with a check-in around expectations. I had some question about whether we had broken any new ground. She reported that she felt that some of her ideas had become clearer and more validated. She also stated that due to the coaching she had enrolled in some courses that would prepare her for her long-range plan of going back to school. She also reported that she benefited from the feedback around her body reactions I pointed out when she was describing certain life paths or job positions. The rest of this session was less formal, with discussions of travel, the stark contrast of the poverty and dirty environment with the beauty of nature in some countries, and our mutual beliefs of the need for humans to grow and develop in order to achieve well-being. I believe these topics helped to establish trust and to pave the way for deeper exploration in the next session.

**Session Four**

This session was conducted in a coffee shop. We began with discussion of work issues. After a few minutes I did an emotional check with her. I stated her affect appeared somewhat flat, and waited to see if she would confirm, reject, or explain this obser-

*I sternly checked myself here to try to avoid taking control, and I let “the monkey” slink back to her shoulders.*
vation. After a very long silence she began to explain very significant issues in her personal relationships.

At this point I experienced some revelations. In the back of my mind I had felt that something was missing. I had been feeling throughout the coaching relationship that something was blocking Cheryl from fully engaging in and feeling passionate about effecting change at work. This was it! The missing piece! There were more significant issues at home than at work. I sternly checked myself here to try to avoid taking control, and I let “the monkey” slink back to her shoulders. I believe I was somewhat successful in doing this. However, even as I write I am making a mental note to check this out with Cheryl next session.

I proceeded to ask questions such as “Do you feel safe? Do you have a quick escape plan in case you were ever to need it?” and so on. I also established that she was getting help from other appropriate resources. I then asked questions aimed at getting clarity on her feelings, and whether she intended to take any action. It became clear that she wanted to take action. She had wanted to take action for many years, but something had prevented her from doing so. She clearly had a problem to solve, neither a puzzle nor a mystery. This problem involved a dilemma. Each course of action she could identify had both positive and negative consequences. However, in voicing these consequences, it became clearer to her that one course of action had greater positives and fewer negatives than the other. She actually had the clarity all along, but voicing it appeared to bring it closer to the surface. I asked if some action needed to be taken, and when she said yes I pressed her for a timeline. She was unable to be 100% confident that she would take this action by the timeline, so the conversation turned to what she needed to assist her to take action. She identified two needs: empowerment and further information. She knew where to get the information, so we explored when in her life she feels powerful. I concluded the session by reinforcing that gathering information and doing things that make her feel powerful were actions in themselves. She affirmed that she would state her wishes and intentions to her partner by end of two weeks.

Sessions Five–Seven
The next three sessions were done in informal locations and will be described together. Cheryl had not been able to state her wishes and intentions due to a change in circumstances; the environment in which she planned to communicate did not materialize. However, she stated that the exercise of having an intention with a timeline helped empower her to be confident that she was on the right path. We spent some time going down the path of performing the action she wanted to take, not exactly a role play, but talking through scenarios. She identified some

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potential blocks, and we explored ways to get around them. I asked questions such as, “If he responds by doing nothing, what will you do?” This enabled her to become more concrete and specific in her demands, to include timelines, and to employ consequences to her demands not being met.

**Session Eight**

This session was opened with open-ended questions about what has been happening that she would like to talk to me about. She stated that both work and personal life were crazy, and I asked her which area she would like to tell me about. She stated she had taken the planned action in her personal life, and that her partner had agreed to her basic demands, including actions to be taken in two weeks time. However, he had suggested some stipulations that increased the negative side of the balance in her dilemma. We went back and revisited the consequences of following through and not following through with her demands. She stated that she was still clear that the best path, indeed the only viable path, was to get her demands met. In exploring these negative aspects, she identified that she may have a role to play in being able to let go of control.

In closing I related to her that she expressed herself more assuredly than she had a few sessions ago; that when she stated she was going to go forth, make changes in her life, she now carried more conviction; and that I now felt no doubt that she would indeed carry out her plans. We intend to keep meeting, checking in periodically, as we agree that we are both benefiting from this relationship.

**Summary**

The majority of the coaching done here lies in the reflective realm of executive coaching (Lazar & Bergquist, 2007) She directed the flow of conversation, and I reflected what I heard (both verbal and non-verbal) what I saw (body language) and I asked for clarification. I also engaged in all three areas of performance coaching: engagement, empowerment, and opportunity coaching (Lazar & Bergquist, 2007). These were in the areas of coaching Cheryl to perform the action of making her demands/needs met, and in defusing an escalating situation or not “taking the bait”. Engagement included teaching and suggesting resources around dealing with people that may have hidden agendas, and so on. Empowerment coaching was done in the form of relating to Cheryl the way in which she presented herself and her convictions to me. Opportunity coaching was done with the exploration of when and how to approach her partner with her demands.

Through this coaching practicum I have learned that my background in occupational therapy has given me strengths in...
listening skills, finding strengths in the person I’m coaching, not judging the person I’m coaching, and empowering the person I’m coaching. I believe I will become a better coach by incorporating a broader toolbox of coaching skills, and working towards complete objectivity.

**PEER-BASED COACHING IN THE YUKON GOVERNMENT:**
**BILL BERGQUIST’S VIEW FROM THE OUTSIDE**
I have been fortunate to work with some very gifted and dedicated men and women in the Yukon Government. This is truly a region of our world where the pioneering spirit still exists: people still try out new things and are willing to be a bit different from one another. It is also a region where men and women are forced (or choose) to be self-reliant. They tend to learn from one another without a whole lot of assistance offered by or heavy-handed control exerted by “experts” from other provinces and territories of Canada or from the United States. Peer-based coaching might, therefore, be a bit more appropriate and a bit more acceptable in the Yukon than it is in other parts of the world.

There are several observations I would make as someone from outside the Yukon that I believe are applicable in many other government (and nongovernment) settings. First, there are important skill-set overlaps for the mature and accomplished men and women who get trained as peer coaches. A successful training program will build on these overlaps. Furthermore, the leaders of successful training programs will assist peer coaches in acknowledging and gaining confidence in the use of skills and knowledge they have acquired previously in their career. Newly-trained peer coaches are not starting “from scratch.” Rather, they are building on a substantial foundation as successful managers, leaders, mentors and colleagues.

On the other hand, there is still much that is new for the peer coach. The initial coaching assignment (practicum) can be quite a challenge—as these three case studies so vividly illustrate. Peer-coaches-in-training will often either fall back on habitual behaviour (what cognitive psychologists call “procedural memory”) or become de-skilled for awhile in trying out new behaviours (what cognitive psychologists have identified as the often disconcerting movement from “procedural memory” to “expository memory”). Much as a golfer or tennis player will watch her polished game fall apart when trying to acquire a new set of skilled movements, so good managers or mentors will often lose the “natural” skills and strategies they have easily employed for many years while trying to become effective organizational coaches. As facilitators of peer-based coach training programs, we must offer considerable support and encouragement to match the exceptional challenges being faced by these newly-minted peer coaches.
peer coaches. Support that is offered by fellow-participants in the coach training program is also invaluable. I have found that coaching trios—composed of three (or four) participants in a coach training program—are very effective. The regular meetings of these trios for three to four months after the training program or during intervals between coach training sessions, not only increase retention and application of coaching skills and knowledge, they also provide an opportunity for coach-trainees to assist and support one another in meeting the challenge of first-time coaching. Members of the coaching trios, in essence, provide coaching not only to their first-time client, but also to their team members.

This shift from habitual (procedural) behaviour to newly-learned behaviour (expository) is a major challenge not unique to those who are preparing to be peer coaches. This shift offers a major challenge for anyone seeking to be an organizational coach. Any of us who have been trained as coaches (rather than just slipping into this role from our other role as consultant or advisor) know what it is like to face that first client. In some ways, it might actually be easier to begin as a peer coach than as an external coach. Peer coaches already have some credibility as colleagues with their first-time clients; furthermore, the production of well-trained peer coaches over time can contribute in a very powerful way to the creation of a “coaching culture” in an organization. Most members of the organization will come to appreciate the value of coaching and want to assist by being available as first-time clients to their colleagues. This certainly has been the case in the Yukon Government. It became easier over the years to find men and women who would like to be coached by the peer-coaches-in-training.

Another challenge inherent in many coach training programs and certainly in most peer-based training programs concerns non-payment for coaching services. There is no accountability, given that the coaching services are not being compensated by either the client or the client’s organization. Yet, I have found that there is a counter-weight to this problem of non-compensated services. Typically, the Yukon Government employees that I have trained do receive “payment” – in the form of thoughtful feedback from the person they are coaching either at several points during the coaching practicum or at the end of the practicum. Furthermore, there is substantial “payment” to peer coaches in their acquisition of skills and concepts that can be applied in their daily work as managers, leaders and mentors. Furthermore, these peer coaches learn about the operations of other divisions in the Yukon Government, which certainly can make their own job a bit easier to perform.

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Bill Bergquist has offered professional coaching services since 1973. As author of forty-four books and more than fifty articles, Bill continues to be interested in the dynamics of profound individual, group, organizational and societal transformations. He has coached and consulted with corporate, human service, educational, and religious organizations throughout North America, Europe, Africa, and Asia. Having served as President of The Professional School of Psychology (PSP) for the past 22 years, Bill is now concentrating on conducting a distinctive doctoral tutorial program at PSP that blends intensive in-person and virtual at-a-distance interaction between tutor and mature, accomplished student. With John Lazar, Bill co-founded and serves as co-executive editor of IJCO (www.ijco.info) and was also one of the co-founders of the International Consortium for Coaching in Organizations (ICCO, www.coachingconsortium.org), currently serving as Dean of the ICCO Symposium Series.
Finally, there is a side benefit that was not anticipated at the beginning of this peer-based coaching program. Some of the participants in this peer coaching program did not come from government, but were (like Jennifer Ellis) invited to participate in the program as a form of “public service.” Furthermore, many of the peer coaches sought out practicum clients who were not employed by the Yukon Government. In their work with these nongovernment clients, the peer coaches provided a unique and alternative form of “public service.” Through this program new ways were identified for bridging the chasm that commonly exists between government and the public. In the long run, this may potentially be the greatest benefits to be derived from a peer-based coach training program that is run inside a government agency.

I have certainly learned much about government operations in the Yukon Territory. Even as a citizen of the United States, I have gained much greater appreciation in working with the Yukon Government for the dedication and competencies of these Canadian government employees, as well as those from outside government (such as Jennifer Ellis) who benefited from this collaborative arrangement. I suspect that the three case studies presented in this article will lead you, the reader, to a similar conclusion. Furthermore, I know that my non-government colleagues in the Yukon, who volunteered to be first-time coaching clients, have also come to a fuller appreciation of the dedicated men and women who have served as their peer coaches. Through review of these three case studies, we can all come to a greater respect for the considerable time, energy and thoughtfulness these peer coaches have devoted to the provision of assistance to their colleagues both inside and outside government.

**REFERENCES**


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Jennifer’s professional career is diverse. Through her business, Factor Facilitation and Communications, she provides facilitation, training, coaching, and writing services to government, non-government and First Nation clients. Jennifer has also worked as a staff member of both local and national non-government organizations and recently wrapped up her term as an inaugural board member for the national Human Resource Council for the Voluntary/Non-profit Sector. She is currently working on a Masters in Education (Community Leadership and Adult Education) through the University of Victoria.


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