A 'Whole Person Learning' Approach to Coaching and Mentoring

Preface

This paper provides a summary of my Masters Dissertation undertaken in 2014 offering findings and conclusions following research into the extent to which a 'Whole Person Learning' approach to coaching and mentoring results in transformations in the workplace.

The research drew on the experience of Executive Developers in Oasis and clients within one organisational setting.

I wish to thank Oasis School of Human Relations and the organisation within which I carried out my research. Whilst the individuals remain anonymous within my study, you know who you are and I am immensely grateful for your time and willingness to share your personal stories and journeys with me.

A note on terminology:

In the realm of coaching and mentoring, definitions are wide and varied. The organisation that I have researched uses the term 'Executive Development' to describe the one-to-one developmental relationship that encompasses coaching and mentoring.

The consultancy organisation that I have researched is called the Oasis School of Human Relations, which I have abbreviated to Oasis.

Executive Developer may be abbreviated to ED
Whole Person Learning may be abbreviated to WPL
Self and Peer Assessment (SAPA) refers to a performance and learning assessment approach that includes self and peer assessment.

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Executive Summary

Exploring the extent to which a 'Whole Person Learning' approach to coaching and mentoring results in transformations in the workplace.

'Whole Person Learning' is a little used term in the Coaching and Mentoring world in an organisational setting. Organisations are recognising the power of coaching as a means of enabling change and yet a narrow performance focus is unlikely to enable and sustain the deep transformations required given the pace and complexity of today's world.

The purpose of the research was to explore the territory and characteristics of a Whole Person Learning approach to coaching and to assess whether its impact would result in transformations in the workplace.

The opportunity arose to investigate the particular circumstances of an organisation transforming from a traditional family-led business to one seeking a more distributed approach to leadership, so the key objective was to explore the lived experience in this setting and to investigate the effectiveness of a WPL approach in this context. The research questions were:

1. What defines a Whole Person Learning (WPL) approach to coaching as distinct from other forms of coaching?
2. What is the lived experience of a WPL approach in coaching encounters from the perspectives of both coach and client?
3. Given the context of moving towards a more distributed approach to leadership, what evidence is there of shifts or transformations in the workplace as a result of this approach to coaching?

Through a case study within one organisation I studied six coaching relationships from the perspectives of both coach and client, primarily through semi-structured interviews. I analysed findings using template analysis to identify and cluster key themes. The contributors remain anonymous and I am grateful for their time and contribution to this study.

My findings illuminated a number of distinguishing features; that a WPL approach flourishes when the organisational context allowed freedom to work with the whole person, that the freedom to go beyond presented issues was made possible by the strength, depth and trust of the peer relationship and that coaching the 'leader in life' was more powerful than just the 'leader in work'. A distinguishing element of the WPL coach was that making explicit the 'not knowing' or vulnerability of the coach reinforced the peer relationship and modelled a WPL approach.

I concluded that this holistic, relational and transformative approach had a significant impact on individuals and the move towards a distributed leadership environment and that this would add to the theory and practice of coaching and mentoring particularly within the context of distributed leadership in organisational settings.

Summary of Conclusions

The overriding objective in undertaking this study was to explore the extent to which a Whole Person Learning approach to coaching and mentoring really did result in transformations in the workplace. Within this it was necessary to understand more of what defines this approach and to explore whether this approach was distinct from other approaches or simply a new term to describe what prevails in the coaching world.

I found that there was an inevitable degree of personal judgement involved when drawing conclusions in a study of this nature. I have attempted to highlight areas of differentiation as well as drawing out similarities with other approaches.

I have identified that this approach offers meaningful difference to many other approaches and for the people within this organisation there was clear evidence of a significant impact both on them, their relationships with other people and the move towards a more distributed leadership environment.

Distinctive Features of the Whole Person Learning Approach

1.   The importance of the organisational context and alignment with the OD agenda cannot be understated in allowing freedom for a Whole Person Learning approach to flourish.

One of the critical components of success has been the organisational context both in terms of aligning with the overarching OD agenda and in setting parameters that go beyond a more traditional approach. As one ED stated, 'the context in which you operate has a huge impact on how far you can go.' The case study of this particular organisation was helpful therefore in reinforcing some of the conditions of success.

This is true of any coaching approach as Clutterbuck and Megginson (2005) advocate. Yet what was specific here was the following:

- The organisation allowed a period of learning, i.e. time and space for people to work things out and learn; not only within the one-to-one coaching relationships but also when putting their learning into practice.
- The WPL approach aligned with other key developmental interventions such as the leadership development programme which reinforced the message that 'being a leader in your life' would enhance one's ability to be a better leader in work.
- The contract for coaching sessions was between the individual and the ED, not with the organisation. This gave freedom for individuals to bring whatever was important for them to discuss, yet within a frame of being in service of the organisation.

The evidence supports the view that Executive Development has had a significant impact on individuals and that they have been making a visible and felt impact on the move to a more distributed leadership culture. The particular circumstances of a family-run business moving to one with non-family members running the organisation presented complex issues for senior members of the organisation to work with. ED provided the safe place for reflection to work these issues through. The whole person approach as experienced by the participants of the study has had a profound impact on clients and on their wider relationships. However, I believe that this would not have been able to flourish without the organisation giving 'permission' by setting the contextual conditions that allowed for the freedom of this approach.

2.   Coaching the leader in life is more powerful than focusing only on the leader in work.

A sense of 'interconnectivity' came across strongly in the interviews – you can't separate people from their contexts, their history, their personal as well as work

lives, so working with all of whatever the person brings and having the freedom in the organisational contract to work through all of it in service of the organisation was key. This for me has demonstrated close links with the tradition of Life coaching (Grant and Cavanagh in Cox et al.) in that it takes 'a personal values based, holistic approach to personal change and development' but differs in that life coaching is mostly contracted and paid for by the individual outside of the organisation. In my experience, it is rare to find this level of investment in the person within organisations and yet the impact and benefits in this setting were clearly evident.

3. The freedom to go beyond the presented issue was made possible by the strength, depth and trust of the peer relationship.

Whilst trust is a core ingredient of any one-to-one relationship, what was on offer here allowed for the scope for freedom to explore what was needed. In one case this meant that the focus of the relationship was on an issue that caused a high level of distress. Many coaches would not have entered this territory, believing it to be therapy, yet when framed in the context of development, and given a high level of trust between both parties, it resulted in a transformative and developmental rather than remedial experience for the individual.

There was a paradox between the levels of freedom and the robustness of boundaries and it transpired that there was a wealth of learning at the cusp of boundaries. In the previous example, the ED was very conscious to remain in a developmental space – distinct but close to the boundary of therapy.

From my perspective, it is rare to offer such high levels of freedom in an organisational context and requires a high degree of trust with all parties.

It should be noted that whilst there was freedom, it was based on a willingness to go where the client wished to go rather than being determined by the coach.

4. Making explicit the 'not knowing' of the coach in the coaching relationship models the whole person approach and reinforces a peer relationship.

This area was one of the most significant features in the 'whole person approach' that I have found in my study that potentially runs counter to the coaching enterprise (Spinelli, 2010 in Cox et al.). What I noticed was that the sharing by the coach of what is not known is seen as valuable and allowed the relationship to become more peer based – a levelling of the relationship, which opened the door for more challenging discussions. This provided a development opportunity for the client to work within a more peer-based relationship mirroring the culture that the organisation wanted to develop. This aligns with existential theory (Spinelli, 1997)

that the immediacy of the current coaching relationship is seen to be the 'microcosm' of the client's current lived experience in the world.

The preparedness to show some level of vulnerability as a coach allowed for the coach to 'be with' as well as 'be for' the client.

The idea of vulnerability is relatively new in organisations and yet there is a growing call for authentic leadership in organisations (Avolio and Gardner, 2005, Lee 2003). Brown (2010) defines authenticity as 'the daily practice of letting go of who we think we're supposed to be and embracing who we are.'

I anticipated that this may disarm the coach in some way but found that rather than disable the coach it empowered the client to have more peer-based conversations and modelled the behaviour that was sought in the distributed leadership environment.

In a sense it gave the 'permission' for the client to share more of their own vulnerabilities ending in a more profound and meaningful experience.

This approach was not without its risk, for either party in the relationship, however it demonstrated that the 'real' trust bond between the parties is even more pronounced than in a conventional relationship. It spoke of the courage required to enter whole-heartedly into any relationship and in particular the coaching relationship. This supports Critchley (2010) in that the dynamic of the co-created coaching relationship can be learned but requires courage as a coach to make observations, state how it is experienced and make hypotheses of what this might mean.

The openness of approach and degree to which vulnerability was allowed by both parties was evident in my study suggesting this was a core element of the WPL approach.

For the EDs in my study, the on-going development of themselves was crucial to their practice; the deep understanding of their own inner self, and acceptance of their own vulnerabilities could be argued is a necessity for a successful 'whole person approach.'

Core Coaching Conditions and Skills

This was an area that aligned with much of the literature of coaching and mentoring. It was evident that the Seven Stage Model was a useful frame and articulated many of the skills and conditions of an effective coach.

The skill of listening and the ability to provide a space for reflection remained for me one of the most critical attributes of a coach, as Kline (1999) stated: 'the quality of your attention determines the quality of the other person's thinking.'

What was interesting was that the clients pointed out an array of skills that the EDs were using which for them described the characteristics of the whole person approach. This array aligned with much of the prevailing literature (Starr 2011, Downey 2003, Megginson and Clutterbuck, 2005) which led me to conclude that it is not just the skills and process that define a Whole Person Learning approach but the context within which these skills and processes are applied.

A holistic, relational and transformative approach to one-to-one development

I set out on this exploration of the WPL approach with a healthy scepticism about its uniqueness and yet I struggled to find an approach that fully described the whole person approach in all its richness because it operated at so many levels.

Primarily I have concluded that the WPL approach takes a whole person perspective in multi dimensions:

- taking a whole person perspective of the client in their context
- taking account of the whole person in the approach to learning and development of the relationship therefore
- demanding that the coach develops themselves in a whole person way
- resulting in the crucial importance of the relationship between the coach and client as the vehicle for learning.

I found lots of evidence of the elements of a whole person approach in the literature. For example:

- A focus on the inner self (Hawkins, Lee) and focus on specific elements such as the transpersonal (Rowan, Whitmore).
- There are references in the literature that focus on the approach to learning at many levels. For example, Hawkins, who describes 'shifts in the room', picks up on the physical, behavioural and feeling tones.
- The 'development of the self' is also a known concept in coaching. For example, in Gestalt coaching (Bluckert, 2006).

- Central to coaching is the relationship between coach and client and I found many references to the importance of building a strong relationship (Starr, Rogers, Cox et al) and yet few go as far as to say that the learning is found in the crucible of the relationship between coach and client.
- Critchley (2010) was one exception and I found joy in reading the prioritising of the 'importance of the co-created "here-and-now" relationship is the central vehicle for development and transformation.'

The term 'whole person', whilst used in health, education and sports settings, is not widely seen in the world of coaching and mentoring. In *The Complete Handbook of Coaching* (Cox at al, 2010), the phrase did not feature, yet many approaches referred to aspects of the whole person.

The term may be new to the coaching and mentoring world within organisations and I believe that the addition of this approach and terminology in the coaching and mentoring literature will add to both theory and practice. I have recognised it as an integrative approach, rare in an organisational context in that the focus was on the whole person not just in work but also in life. It goes beyond Life coaching, being grounded in a work setting and combines theory and experience drawn from the field of humanistic psychology and in particular Heron's work (1992) as well as other traditions.

At its heart, I found that a WPL approach was not so much a model as an approach that called for people to be more fully human, both as a coach or Executive Developer and as the client, which enabled the development of a deep relationship and created an environment for transformational change and development. I couldn't say if other approaches would have had a major impact on the transformations of people and the workplace but I concluded that this approach had indeed had a significant impact.

I conclude that coaching and mentoring theory would benefit from including a WPL approach to coaching and mentoring as a distinctive integrative approach that has the potential for transformational change within individuals and organisations. The case study adds to the practice of a WPL approach through the description of the skills and attributes and draws out key characteristics and conditions for success.

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