The Grand Challenge for Research on the Future of Coaching

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Abstract
The popularity of coaching as a development activity in organizations has outpaced the research. To inspire research and strengthen our intellectual foundation, the Thought Leadership Institute of the International Coaching Federation invited 35 of the most recognized coaching scholars and 12 coaching leaders to three two-hour discussions. Each session began with three presenters briefly sharing observations about what we know and need to find out. The three sessions focused on: (1) the desired outcomes of coaching; (2) the process and mechanism of coaching; and (3) coaching for people from distinctive cultures, genders, and context. A fourth theme emerged as the major gap in the research about the competencies of effective coaches. This paper summarizes the discussions. Twenty-two specific research needs for the coming years are identified and presented, clustered within the four themes. This should provide guidance for graduate students, faculty and consultants considering research on coaching.

Keywords
training and development, organizational behavior, mentoring, change

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If coaching is to continue to help create and support a better society worldwide, it is crucial to study, develop and improve the practice of coaching. The integrity of any field of practice rests on its intellectual foundations and research, which distinguishes and sustains what works from what is unsubstantiated and fads.

To explore the Future of Coaching (FOC) and how research can help shape the future, the ICF Thought Leadership Institute (TLI) invited 36 recognized, published scholars and researchers of coaching to a series of three 2-h Zoom sessions to discuss current, research-based knowledge about coaching and explore what is essential to learn in the future. The desire was to achieve consensus on what we know about coaching based on rigorous research and to provoke and guide future research. The design for this first convening intended to draw out critical and comparative thoughts about research and scholarship on coaching.

The Thought Leadership Institute (TLI) is a non-profit organization within the family organizations that constitute the International Coaching Federation (ICF). The vision of ICF Thought Leadership Institute is to be a global hub of shared knowledge for human development designed to help the best possible futures of coaching. TLI’s work examines how coaching will be affected by and can affect the future of work, education, social policy, and planetary ecology. The aim is to deliver positive outcomes in alignment with the United Nations Action Plan for societal well-being for individuals, organizations, and communities worldwide (UN General Assembly, 2015). TLI pursues this agenda by convening respected experts, which we call “Wisdom Weavers,” for each theme, to collect and disseminate insights on pressing issues of our time. A Wisdom Weaver provides reflections and shares ideas about that theme. These convenings encourage multi-disciplinary thinking about pressing issues of our time.

One of the principles for convening is that people can arrive at greater insight and contribution through discussion than individuals can do alone. Another principle was that only through honest and courageous critique can a field and the practice of coaching truly develop and overcome the distractions or seduction of fads and current political or value-based dictates. TLI hoped to create an environment where leading scholars could talk, share, argue, and find new meaning or methods to move the field forward. TLI wanted to inspire possibilities of the future. In particular, TLI hoped the convening and this resulting Grand Challenge paper and videos would inspire faculty, graduate students, and scholars to engage in research that can establish an intellectual foundation for the future field and practice of coaching.

There were four specific desired outcomes of the convening. (1) Scholars can design future research on coaching to incorporate designs, variables, and measures that they would not have considered previously. (2) Scholars from different organizations, universities, and cultures could discover new opportunities to collaborate on studies. (3) Major themes from the presentations and conversations would be integrated into a thought or Grand Challenge paper providing insight for practitioners and scholars in the field to consider and prioritize future research and possibilities. (4) A set of videos would be edited from each of the three sessions and placed in the Digital Library for others to view.
Because a gathering and vigorous discussion among scholars will always yield many ideas and needs for future research, within each theme, we have highlighted in italics those studies we believe are the most urgent. This prioritization is not to diminish the importance of every study discussed but to offer a possible rank order to guide graduate students, faculty, and coaches. In the following sections, we used direct quotes from presenters, attendee’s comments in the general discussion, and chats to capture the nature of the exchange.

**What Are the Desired Outcomes of Coaching?**

Coaching experts are often asked, “Does coaching work?” We cannot answer that question without first defining what determines coaching effectiveness. A starting question is then, “What are the desired outcomes of coaching?” For those who believe that coaching helps, we also need to reconsider the basis for our beliefs before exploring how to make coaching more effective to train or certify coaches.

Published research based on one or more studies shows that coaching delivers the following outcomes. Client (coachee) satisfaction with their relationship with the coach and the process results from coaching (de Haan et al., 2019, de Haan et al., 2020). The client’s intention to act on and expect specific goals results from coaching (Grant, 2012; Spence et al., 2008). An improved sense of well-being results from coaching (Spence & Grant, 2007). A more substantial and coherent personal vision of one’s ideal future results from coaching (Mosteo et al., 2016). A wide variety of health outcomes also result from coaching, such as increased quality of life measures, decreased pain, health care utilization (Hackshaw et al., 2016), and potential behavior change (Frates et al., 2011) (Sforzo et al., 2019; Wolever et al., 2013). Nevertheless, the outcomes assessed reflect a narrow part of the spectrum of possible desired outcomes (Athanasopoulou & Dopson, 2018; Theeboom et al., 2014).

Several coaching outcomes have not been studied or sufficiently rigorously studied. Self-change could be an additional important coaching outcome in behavior change and change in self-awareness, self-access, self-regulation, self-insight, self-cogruence, and self-reflection (Diller et al., 2021a, 2021b). Behavior change could include the improvement of behavior or competencies that help clients be more effective (Boyatzis & Cavanagh, 2018; Grover & Furnham, 2016), have better relationships with others at work and home, and improve their performance (both measures of success and effectiveness, Luthans et al., 1988). If such positive behavior change is documented in numbers, the cost-effectiveness of coaching and various approaches to coaching can be studied and established. Peter Hawkins added, “It is important to move our focus increasingly from researching coaching inputs, to outputs, to outcomes, and to value creation for all the coachee’s stakeholders, and the links between each of these four levels.”

Melvin Smith mentioned the benefit of conceptualizing and using less invasive measures than direct response surveys. His observation calls for more creative assessments than surveys. Coaching research will need a broad range of operant and unobtrusive methods to gain credibility. While many of these can come from behavior changes
of the client, the assessment of behavior change would require multiple data collections from others, videotapes which are later coded, or audiotapes of a critical incident which are later coded (Boyatzis, 1998). Ellen Van Oosten pointed out that to understand desired and even expected outcomes, the experiences, narratives and stories of both coaches and participants need to be studied, which calls for qualitative studies and quantitative (Passarelli et al., 2021).

The best research is predicated on sound theories, which typically offer clearly defined outcomes, including autonomous motivation, self-determination, readiness to change, mindfulness, psychological resources, well-being, and other desired outcomes. Outside of the field of coaching for health and wellness, where theory and opinion-based coaching competencies have been collaboratively defined and standardized in the US (including the transtheoretical model, self-determination theory, motivational interviewing, positive psychology, and mindfulness), the broader field of coaching lacks consensus on a theoretical foundation of coaching. Coaches have the opportunity to draw from a wide variety of fields involved in individual change, from psychotherapy to teaching to social work; many theoretical models can be used and adapted as needed.

Of course, the platinum standard to test coaching effectiveness is a randomized assignment, comparison group, pre- and post-test design. Although possible (de Haan et al., 2019; de Haan et al., 2020), this design is challenging to conduct and recruit participants. Coaches often resist getting involved with research (Hinn & Kotte, 2021) partly because of the time it takes to collect and analyze data and then write the results. It is also time-consuming for the coach’s clients. It can also be risky to a coach’s sense of their effectiveness.

Melvin Smith raised the challenge of including organizational or institutional outcomes as part of the larger research agenda on the effects of coaching. This type of research would go beyond calculating return on investment in coaching to possible cultural effects on engagement, organizational citizenship, and product or process innovation. Jones, Woods, and Guillaume (2015) conducted a review of research on workplace outcomes and recommended a variety of appropriate and useful variables to consider.

Jonathan Passmore raised a big picture issue when he asked, “When people look back on this conversation in the archive, when they think about the work that we as researchers were doing during the 2020s, they might be asking what were coaches doing when the planet was burning? Maybe the answer is...actually, coaches were just simply helping their clients to make the fire glow hotter. We’re focusing on amplifying individual and organizational performance, and those might be important issues, but what about the meta or hard to understand issues beyond those?” The suggestion is that the coach might go beyond what the client raises to include exploration about “bigger picture” issues facing our society and planet.

When contemplating the desired outcomes to assess in a study, the issue arises regarding effectiveness in whose perception. The best research is predicated on sound theory. Although the field of coaching lacks any consensus on what theory is sound, borrowing from other fields involved in individual change, from
psychotherapy to teaching to social work, theoretical models can be used and adapted if needed.

However, when dealing with coaching outcomes, i.e. desired or highest priority, we wonder in whose eyes? The most desired outcomes may vary by who is determined to be the client. Is it the individual being coached? Is it the person paying for the coaching? Is it the person sponsoring or endorsing the coaching? Is it practitioners in the field?

The terms used to refer to the person receiving the coaching further exacerbated our discussion. Terrence Maltbia further explained, “I think the use of the term, like so many, is contextual…our label of “coachee” may not align with their identities, they may identify professionally as executives, leaders, clients, and so on. [It’s] less about avoiding “coachee” or any other label, yet consistent with the principles of coaching is to ask them for their preference.” Do we call them a client? Magdalena Mook added, “We at ICF try to stay away from “coachee” and yet “client” may suggest a different type of relationships as well. So ‘participant’ or [their] actual title is often used.”

‘Client’ seems odd when coaching students, subordinates, or patients in a hospital. Do we call them the coachee? ‘Coachee’ is an awkward label, especially if they don’t see what they are receiving as coaching versus health care, learning, or mentoring. Other labels used at times are learner, participant, subordinate, or victim. The labels used will often imply specific desired outcomes or dependent variables for the research on coaching.

RESEARCH NEEDS:
1. We need studies assessing multiple outcomes to evaluate interaction effects and possible mediation or moderation effects.
2. We need effectiveness studies with at least one or two behavioral measures of desired outcomes, not just self-assessment or self-report measures.
3. We need more research to determine coaching effectiveness on a wide variety of outcomes or dependent variables.
4. Specifically, we need studies with each of the nine desired coaching outcomes conceptualized as a dependent variable (DV) and measured with a method that has the sensitivity to document change. That is, DVs of client satisfaction, client intention or attainment of goals, sense of well-being, vision (i.e., purpose or one’s dream), health outcomes, behavior or competency change, improvement in quality of relationships, performance improvement, and cost-effectiveness, and self-awareness and self-insight.
5. Then, we need replications.
6. We need the research conducted with a wide variety of clients (or coaches) worldwide.
7. We need research on the many coaching approaches and the more effective coaches. The last two research needs were discussed in sessions of the Future of Coaching conference in September 2021 and addressed in detail in sections of this paper to come.
What Processes and Mechanisms of Coaching Are Most Effective and When?

Although practitioners will often promote one approach or style of coaching as superior to another, there is often little or no research supporting such claims. The question underlying the need for such efforts at program evaluation is the question of which processes of coaching work best with whom, when, and in what manner. The understanding of processes can be enhanced by research into the mechanisms of affirmation or change that may occur during coaching or as a result of coaching.

All of the criticisms and needs for rigorous research about outcomes and efficiency mentioned above apply here. Comparison group studies are needed, not merely pre- and post-assessments. The theoretical basis for a coaching process should be well-documented and published in peer-reviewed scholarly journals. Simply writing a book about one’s experiences with coaching, full of moving stories of clients, are not sufficient “research evidence” to the discerning purchaser of coaching services.

For example, as captured in Melvin Smith’s presentation, coaching with compassion leverages Intentional Change Theory (Boyatzis, 2008; Boyatzis et al., 2019; Boyatzis, 2019) and the neuroscience of change (Jack et al., 2013) and draws on mechanisms, like the Positive Emotional Attractor (Boyatzis et al., 2013), to “help another person make progress on their intentional efforts toward sustained, desired change.” Coaching to encourage, force, or persuade people to change in a way desired by others, whether the boss, spouse, parent, or teacher, was conceptualized as coaching to the Negative Emotional Attractor or coaching for compliance (Boyatzis et al., 2019; Diller et al., 2021a). Research into the neural network activation of coaching sessions, using these two approaches with the same clients, has revealed the internal mechanism that enables a client to be open to learning and change (Jack et al., 2013). Angela Passarelli commented on these mechanisms of change, “These factors that exist in the literature are psychological in nature, they’re about needs fulfillment, self-efficacy, psychological capital, emotional intelligence, mindfulness… They are really only the tip of the proverbial iceberg. Underneath the surface exists this sea of opportunity to really dig more deeply into what enables coaching processes to help people change and transform. One way of digging below the surface is to use neuroscience or psychophysiology to help to explore what the body can tell us about how positive change and transformation occur.”

Another question with dramatic implications for practice is the dosage needed for coaching to be effective: how often and how much coaching is required? In other fields, like psychotherapy, rigorous outcome studies have shown little or no effect of the time duration of the psychotherapy, regardless of whether it was short term or long term (Emrick studies from the ’70s). Melvin Smith reiterated the issue of dosage and sequencing as essential elements of a coaching process, each of which should be examined with a wide range of desirable outcomes.

The research designs should include possible interactions among factors. Ellen Van Oosten said, “We’ve been examining the interaction among different factors including
the frameworks that capture how adults learn, grow, and change...the high-quality relationship between the coach and the coachee, and the competencies of the coach that work interactively and reciprocally to inspire, direct, support, and sustain the person’s ability to change.” For example, a client’s needs for competence, autonomy, and relatedness as proposed in self-determination theory (Ryan & Deci, 2000) interact with a client’s development of their vision or dream as presented from Intentional Change Theory (Boyatzis, 2008; Taylor et al., 2019). Meanwhile, the coach’s needs and vision also interact with each other and, by the process of emotional contagion, profoundly affect the client (Taylor et al., 2019). When conducting a study within an organization, the organization’s culture and climate will affect both the client and the coach on these and other variables.

Margaret Moore raised the idea, “It would seem apparent that the reason the [coach-coachee] relationship is rich and effective because the relationship is focused on generating insight. Coaching isn’t a relationship for the sake of a relationship. Its whole purpose is to produce insight. So, therefore, the two are interdependent.” She added, “To expand the coaches understanding of the full landscape of potential insights, coaches ideally seek to get more informed about the variety of contexts their clients are navigating. For example, family implications, race, culture and bias implications...past trauma, and leadership frameworks and norms.” Ellen Van Oosten had raised a research design question about relationships, “Is the [coach-coachee] relationship an outcome of coaching or is it a mediator or a moderator?...Based on the studies that have been done, there is a pretty substantial evidence so far that the relationship is so salient to coaching that it stands alone as one of the outcomes, as well.”

A careful qualitative inquiry into what the client, coaches, and sponsors perceived as key moments during coaching conversations allowed a depth of understanding of the coaching experience. Critical moments were critical to the experience and outcomes (de Haan & Niess, 2015). de Haan et al. (2010) documented a taxonomy of 12 types of critical moments, such as moments of learning, moments of relational change, moments of significant action, and moments of emotional experiences. Earlier research has shown the importance of empathy, trust, working alliance, shared vision, compassion and energy (Boyatzis & Rochford, 2020; Diller et al., 2021a, 2021b).

To study processes and mechanisms, scholars and practitioners need both “thicker and thinner skin,” in Erik De Haan’s words. That is, doubts, however fleeting, should become the focus of studies to either eliminate them, resolve them, or uncover deeper processes that need to be understood. For example, a study can investigate what was occurring during and as a result of the coaching for the client’s and the coach’s and possibly even organizational sponsor’s perceptions. de Haan (2021) referred to this as a Rashomon phenomenon. He referenced the classic Japanese film that repeats the same moments several times from the perception of a different person involved in the event.

Internal mechanisms occurring during the client’s, as well as the coach’s experiences, require neurobiological research. Angela Passarelli said, “This line of research...
suggests that the coaching process can influence the coachee’s frame of reasoning, anchored to their neural architecture, which certainly is a mechanism that would have impact on coaching outcomes.” In a call for future studies, Angela Passarelli pointed out specifically the need for “teasing out the role of temporal construal (future vs. present).” In addition, she said that we need to “embrace the complexity of toggling between states” and replicate and extend such studies to include the coach as a source of data, as well as the coach-client pair or other coaching configurations. There are a number of contexts in which a neurobiological approach may be particularly insightful, including examining the process of coaching supervision, dynamics related to diversity, equity and inclusion, artificial intelligence, burnout/post traumatic growth, and ethics (Boyatzis and Jack, 2018). Future investigation also requires investigating multiple neurobiological phenomena in the same studies to capture possible biological or psycho-biological interaction effects. For example, she posed the possibility of nutrition, sleep, and exercise in enhancing coaching outcomes. Practices that invoke the Parasympathetic Nervous System (i.e., renewal and the only antidote to annoying or acute stress), such as mediation, yoga, and somatic coaching, should be studied as a coaching outcome study.

The conversation quickly turned to the role of artificial intelligence (AI) in coaching.

Our inquiries and studies so far, in large part, examine the human nature of coaching. Nicky Terblanche briefly discussed how he is studying the use of various Chat Bots to provide coaching or enhance existing coaching (Terblanche, 2020). David Peterson felt strongly that, “In 10 years, 90% of what coaches do today will be done by artificial intelligence.” Ellen Van Oosten asked, “How do we incorporate the reality and expansion of artificial intelligence” into our current processes? The additional benefit of being able to use AI in coaching was raised by Richard Boyatzis, “If [AI] democratizes coaching, we can bring coaching to the millions of people who work in organizations who don’t have it right now. It doesn’t eliminate our jobs, it expands the pool.”

RESEARCH NEEDS:
1. We need research on critical moments (or micro-moments) during the coaching process and how they affect outcomes.
2. We need research on coaching process and outcomes, including psychophysiological and neurobiological variables, such as Sympathetic versus Parasympathetic Nervous System activation (i.e., stress vs. renewal), Analytic versus Empathic Neural Network activation, and the toggling between these antagonistic systems.
3. We need research on the role of various approaches to artificial intelligence and coaching bots’ in effective coaching processes and outcomes.
4. We need research examining the mediating or moderating role of the relationship quality between the coach and client and coach and their supervisor.
5. We need research on the moderating or mediating effects of other physiological variables such as sleep, nutrition, and exercise.
6. Studies with variables mentioned in the two items above require special equipment, training in their use, and increased researchers’ sensitivity to holistic images of humans and our interactions.

7. We need research on acute experiences like trauma, post-traumatic growth, and burnout.

**What Are the Competencies of Coaches That Help Clients Change?**

If coaching works, we are compelled to ask how does a person effectively coach? In other words, are there specific characteristics of coaches that help clients or coaches learn and change sustainably? As the practice of coaching expanded and the role of a professional coach was recognized in the 1960s and earlier, coaches, coach educators, and prospective clients were all wondering whether all coaches were the same in their impact. Driven by a concern for quality, as well as guidance in training and certification, models of characteristics desired in coaches were identified and formulated into “competency models.”

Although well intended, efforts to develop and use these competency models leaped ahead of their validation. David Peterson pointed out, “The journey from new coach to good coach really depends on competencies. But going from good to great needs to shift to how do we establish the desired outcomes using a broader repertoire of skills and tools and frameworks.” To date, there are no published studies of competencies of effective coaches (i.e., competencies of coaches that lead to client learning and change). When lacking empirical validation, fields often resort to surveys of current role occupants or their employers. They produce inventories of what is thought to relate to effectiveness. Sadly, such surveys have been shown in other fields, like management and leadership, to be filled with error. For example, in management and leadership, only about 50% of the competencies identified in surveys or Delphi techniques are validated in further research (Boyatzis, 1982).

Furthermore, 25% of those characteristics identified by such means are later shown to be irrelevant, and 25% are opposite to what produces effective performance (Boyatzis, 1982; Spencer & Spencer, 1993). These descriptive statistics include surveys of “experts” or even high performers in the role and ask about behavior. When such competency models are used in training or certifying role occupants, like coaches, at the minimum, time is wasted on the wrong characteristics. At the maximum, the practice intensifies less-than-desired effectiveness.

As Michael Cavanagh pointed out, there have been various studies of coaches’ perceived needed or essential competencies, but they are all opinion surveys. He reiterated what other discussants and presenters said: no existing studies of coach competencies predicting client change or outcomes. Some of these studies were precursors to the University of Sydney’s large-scale survey of perceived coaching competencies for Australia-wide use. Again, each of these models is constructed from opinion surveys and, as a result, is subject to many assumptions about competencies and effectiveness.
One of the sources of error is that such surveys conflate values, job tasks, and actual behavior patterns. A good definition of a competency is, “A competency is a set of functionally related skills (i.e., behaviors) organized around an underlying intent that produces effective performance” (Boyatzis, 1982, 2018). In research on other roles, like management, sales, technical professionals, or human resource and organizational development consultants, a set of threshold competencies or proficiencies have been identified that all job occupants need to be average performers. Then competencies that indicate effective or superior performance are labeled as distinguishing competencies (Boyatzis, 1982; Spencer & Spencer, 1993). As Sandra J. Diller further commented, “It is also important for us to differentiate coaching from other professions...have coaching as a single profession and not try to do everything, because right now, it feels like we have to have every competence – a leader, coach, trainer, mentor... That’s quite impossible.” For example, in her research, she found that coaching and training differ in the client’s basic psychological needs, suggesting a different set of competencies needed (Diller et al., 2021b). In addition, any competency research should examine and determine that the competencies do not further perpetuate racial or minority differences in access to developing the competencies or in assessing the competencies themselves (Roche & Passmore, 2021).

In clarifying definitions further, skills are a specific set of behaviors, such as listening. While we can assume that listening is vital to effective coaching, it needs more specification. Listening can be used to influence someone to come around to one’s way of thinking (i.e., an example of the influence competency), or trying to understand the person (i.e., an example of the empathy competency), or trying to identify shared intent in a team (i.e., an example of the teamwork competency). If listening were assumed to be a competency, people would be trained and certified in the behaviors. Still, without the underlying intent, the person might misuse the skill toward less than helpful ends, rendering the coaching less effective or even ineffective and a manipulation.

Job tasks are things that a role occupant should do as part of their job but are not a behavior or capability of a person. For example, selecting staff is a part of a managerial role. There is no set of behaviors that is “selecting staff.” To perform that task, a manager needs to use systems thinking to discern the activities that a job occupant should do and generate a set of job expectations (i.e., job description). During interviews, the manager further has to screen applicants, calling for various competencies such as empathy, pattern recognition, and emotional self-control. Richard Boyatzis added, “We really want to be able to screen for inclusion a minimum set of standards, but then we want to train to and develop things that actually predict effectiveness.”

Although exploring values is essential to the coaching process, they can also be a source of bias or prejudice for both the coach and the client. Recent history is full of examples of entire fields and organizations imposing their values or cultural biases, thereby excluding capable people and institutionalizing mediocrity and conformity to irrelevant performance characteristics. Such values in practice have excluded people from jobs and roles because they did not have the “right” belief, background, social class, race, gender, ethnicity, or faith. Numerous inferential studies provide
intellectual integrity against performance or effectiveness to overcome such potential biases. A lingering concern within the competency effort is the focal plane through which one views a coach’s capability. Tatiana Bachkirova and C. Layton Smith (2015, p. 128) said, “we argue that reliance on competency frameworks oversimplifies coaching practice and expertise and stultifies more creative solutions for a meaningful ‘rite of passage’.” The discussion pointed out that “competency” used by Boyatzis and his associates is a capability and not the narrower definition of proficiency that some authors adopt.

A rigid or codified approach to a competency “model” without rigorous research against actual performance (not merely opinion) could limit their utility. They may not include every aspect that is critical to superior performance, and some argue that superior performance could also be achieved in many contexts with a different set of competencies (Hayes et al., 2000). For example, the ICF coaching competency of ‘planning and goal setting’ was not universally adopted by experienced coaches (Griffiths & Campbell, 2008). Boyatzis (1982) would claim this is not a competency at all but a job task and, as such, deflects energy from a person’s capability and re-focuses effort on minimal task performance.

The equifinality of any effort to delineate the needed competencies of coaches has some limits; as Kylie Rochford pointed out, “It is quite likely that there are multiple parts to any given outcome... It’s actually quite likely that it’s not going to be any one competency, it’s likely there will be different combinations of competencies, and that’s depending on who you are coaching and your own personal coaching competencies. So, it’s a very complex picture... On the one hand, the simplicity that a competency type approach brings is useful for regulating the field... on the other hand, from more of a scientific perspective of really understanding what’s going on in terms of mechanisms, I’m just not sure we’re ever going to get to a satisfying answer if we are just trying to identify one competency or one role that solves this complex process or explains it.”

Applying competencies in innovative and fast-moving environments is also said to limit inquisitiveness and exploration, thus resulting in a certain degree of risk aversion where new emergent thinking is required (Granstrand et al., 1997). Others argue that competencies result in a reductionist philosophy that causes learning to be focused on the task rather than developing critical thinking (Foss et al., 2004). As a result, competencies may identify successful behaviors in the past or the present but might not be those needed for the future. Competencies also “often ignore not so readily observable behaviour due to the complexity of assessment” (Bachkirova & Lawton Smith, 2015, p. 128).

The confusion of proficiency, competency as capability, and skills mixed in a model could dilute effort and focus on coaches’ needed capabilities in training and certification. “For example, an alternative view of competency approaches in higher education has been offered by Lozano et al. (2012). They strongly argued the need to supplement a competency-based approach with a capabilities approach and identify important differences between competencies and capabilities... This differentiation, if adopted for the assessment of coaches, would mean that the focus would not be on the results
that the coach achieves, but on his/her ability to opt out of an action, choice or behaviour (Sen, 1999).” (Bachkirova & Lawton Smith, 2015, p. 130)

RESEARCH NEEDS:
1. *We need research studies on coach competencies that predict client change and desired outcomes.* When designing such studies, attention needs to clarify which desired outcomes are the dependent variables. It would require longitudinal studies.
2. *We need research distinguishing competencies of effective coaches (i.e., those that predict superior or outstanding performance) as distinct from competencies that all coaches must have to practice (i.e., threshold competencies) to deferentially guide training, certification, and life-long development of coaches.*
3. We need research on which competencies may be more effective with different desired outcomes, different coaching processes or approaches, different cultures in which the coaching occurs, or other clients. These studies must be conducted with diverse coaches and clients to ensure generalizability.
4. We need such competency research to focus on behavioral-level competencies as observed by others to complement self-assessed and self-reported values, traits, and abilities. Particular methods used to assess the competencies must also address both theory and rigorous methods. Behavioral measures of competencies would include 360 s, and reliably coded critical incidents from coaching and videotapes.

**Under What Conditions Does Coaching Work With Distinct Groups of Clients?**

Coaching intends to help people, our relationships, and our institutions to develop in ways that the participants envision as a better future. While the promise of universal development permeates the dreams of coaches and scholars of coaching, it would be naïve to assume the field can escape the systemic biases of our societies and possibly even biases within ourselves as coaches and scholars. The betterment of society leads us to consider how to utilize coaching to combat social justice issues and modify coaching to be inclusive and promote equity with all possible clients. In addition to these meta-questions, we are also curious about the vicissitudes of effective coaching for people by gender, race, faith, and culture. Jonathan Passmore posed the challenge of how coaching could help the existential crises many people are experiencing, including helping to reverse environmental damage and seek environmentally constructive ways to live and work. He stated that the field of coaching is merely beginning to represent various racial and cultural groups. Meanwhile, coaching research reveals even less representation and participation of all groups.

As Morel Fourman said, “As an Anglo-Saxon, Northern Hemisphere mindset of English speakers, we’re a small fraction of the planet’s population. Where, as a small group, we’re reflecting a small fraction of that very small fraction, so we have to cast our net much wider, and it’s not about including them in our conversation.
It’s with humility, listening out to different cultures’ mindsets, populations, language groups, and listening to what the same pattern of one human being creating a conversation with one another which adds value to one or both.” He then added in another part of our conversation, “We want to listen into different coaching cultures...to be relevant, we can’t just explore coaching, we have to become learners from different cultures of coaching, and then we might deserve the role of being a vehicle for coaching and a voice for coaching in the world.”

Andromachi Athanasopoulou, who has published with Sue Dopson based on their systematic review of outcome studies on global coaching practices, drew also on their other research on women’s leadership development and concluded that coaching of female leaders or professionals does not always have the same impact as it has on their males peers. This is because there is a lack of consistent systemic support to female leaders which – along with coaching – could help them reach their full leadership potential. Even with these differences, coaching has been effective with females in changing their behavior and improving the quality of their relationships. The conclusion is that we need more research to understand whether women need to be coached differently than males and more research that examines whether females coach differently than males.

However, there is no research to help us understand whether females coach differently than males. Richard Boyatzis said this raises what has been called the “matching hypothesis” in coaching and as introduced in other helping professions. In other words, is a female coach better with female clients? Are people of similar sexual orientation better at coaching people of varied sexual orientation? The same question can be raised about the racial characteristics of clients or their faith or cultural orientation. Andromachi Athanasopoulou also raised whether females need different types of coaching, doses, or sequences than their male counterparts at various life and career stages.

The question arises about how the “context” of a coaching experience and progress affects the efficacy and outcomes. Christian van Nieuwerburgh discussed extensive work he and a colleague, Raja’a Yousif Allaho, studied and have written about - coaching in Islamic contexts (Van Nieuwerburgh et al., 2021). Their efforts suggest the importance of checking to ensure that coaching models and processes are appropriate for various specific cultural contexts. For example, in Islamic contexts, consistency of one’s vision and dreams with tenants of their faith is seemingly much more important. They called their approach “ershad.” Ershad is coaching consistent with the teachings found within the Quran. Another example Christian van Nieuwerburgh claimed is that family relationship is more central than work aspirations when coaching Islamic clients.

Access to development as a coach, the gateway social networks and programs to coach certification will likely be affected by social networks. Such networks are highly sensitive to context and equity of access. Intentional as well as unintentional forces may affect differential access to these resources by race, ethnicity, social class, as well as gender and faith around the world. The field of coaching, research on coaching, and graduate programs training researchers should be making explicit efforts to compensate for any systemic, intentional or unintentional differences.
Another form of context may appear in the more significant environmental, social, and health issues, like the COVID epidemic. Nicky Terblanche (2021) explained some possible problems that arise when treating people who have had COVID or have had close friends or relatives die from COVID. He also examined the post-traumatic stress conditions for health care workers and others following several years of social isolation and fear.

Coaching during the COVID pandemic has brought health outcomes to the forefront of desired outcomes. Margaret Moore reviewed many studies showing that health coaching or coaching within the context of health care has demonstrated dramatic positive, clinically significant outcomes. As suggested earlier by Angela Passarelli, she indicated that legacy trauma and post-traumatic syndrome affect the efficacy of various approaches to coaching.

Margaret Moore reiterated a comment by Melvin Smith earlier about the importance of studying the profound interactions among institutional or organizational development and individual coaching in our research. Team coaching is a halfway house between levels. Richard Boyatzis pointed out that coaching with compassion, as suggested and tested with Intentional Change Theory, is helping at all fractals of human endeavor. He proposes that coaching to the Positive Emotional Attractor works effectively to activate neural networks and hormonal systems that help a person be open to change and learning. Coaching teams, organizations, and communities to the positive emotional attractor would create a fractal positive efficacy.

During the breakout and plenary discussion of these ideas, Richard Boyatzis proposed that there is likely a dramatic gender by culture interaction.

RESEARCH NEEDS:
1. We need research to determine processes, approaches, and desired outcomes of specific types of clients, including women, gender diversity, people of various races, ethnicities, faiths, and gender orientations.
2. We need research to understand the components of context that are key to coaching all people’s effectiveness and sensitivity to differences.
3. We need research to understand differential participation in coaching and coaching researchers of people from various groups. Then, to do more research to increase coaching and coaching research participation.
4. We need research to show how coaching can help people, organizations, and communities improve social justice, inclusiveness, and equity.

Concluding Hopes for Future Research
We have evolved the field and practice of coaching into a multi-faceted profession, global phenomenon as a social role, embodying the elements of a profession. It could be said that coaching in various forms of helping, mentoring, guiding, parenting, and other forms of intentional helping behavior have been the most frequently used approach to helping others in recorded and oral history. As with any activity that seems to help people, the practice can outrun our intellectual foundation based on
sound theory and research. This dynamic can result in popular approaches that may work, maybe fads, or, worse, manipulations of people vulnerable to a deep need for development. We convened these sessions to stimulate an exchange of ideas that could build a consensus about what research is needed to secure the intellectual integrity of our current coaching activities and guide us toward a better, more effective, and compassionate future through coaching. We seek scholars, faculty guiding graduate students, coaches, and leaders of coaching organizations to discuss the same topics and questions as we did and inspire more and better research across organizations and approaches.

**Declaration of Conflicting Interests**

The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

**Funding**

The author(s) received no financial support for the research, authorship and/or publication of this article.

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**Appendix A: List of Attendees From All Sessions**

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Appendix B: Detailed Design, Themes, and Presenters

In 2021, the event was designed as three 2-h Zoom meetings scheduled one week apart (i.e., September 1, 8, and 15th). All six Board members of TLI and a representative from each of the other ICF family organizations, the ICF CEO, and the Director of Research attended the sessions. Of the 36 invited scholars or researchers, 30 attended one or more sessions. The complete list of attendees is shown in Appendix A. The size was selected to maximize dialog about issues, not merely presenting papers, keeping in mind that 49 is the maximum number of people who can appear on one screen in Zoom. The sessions, complete with presentations, discussions, and chats, were recorded.

Each 2-h session had three approximately 15-min brief presentations by leading scholars on a theme followed by a 15-min breakout in small groups and then an hour of open discussion of all attendees. The nine presenters in the three sessions included a scholar from each of the four major university centers, plus selected other published experts. The three themes and presenters were:

1. Desired outcomes of coaching: What existing published, rigorous research tells us about the effectiveness of coaching? What new research is needed?
Presenters: Professor Erik de Haan (Ashridge College/Hult University); Professor Jonathan Passmore (Henley); and Professor Ellen Van Oosten (Case Western Reserve University).

2. **Process and mechanism of coaching:** What existing published, rigorous research tells us about the process and internal mechanisms of coaching? What existing published, rigorous research tells us about the competencies or other characteristics of effective coaches? What new research is needed? **Presenters:** Professor Michael Cavanagh (University of Sydney); Professor Melvin Smith (Case Western Reserve University); and Professor Angela Passarelli (College of Charleston).

3. **Coaching with various clients:** What existing published, rigorous research tells us about the differences that might be important for effective coaching of women, visible minorities in multiple cultures, various cultures, and ethnic groups, people in diverse social and economic groups? What new research is needed? **Presenters:** Associate Professor Andromachi Athanasopoulou (Queen Mary University of London); Professor Christian Van Nieuwerburgh (East London University); and Margaret Moore (Institute of Coaching, Harvard University).

The invitation to presenters asked for discussions to focus on research that has been done and research that should be done in the future. The study could be qualitative, quantitative, discovery, or deductive and inferential testing. The discussion could include research methods. The presenters were asked to share their and colleagues’ working assumptions.

Themes suggested for future FOC sessions include coaching in various cultures beyond that addressed in the third theme above, team coaching, and artificial intelligence.