Coaching from the Heart Play Book

Based on Equine Alchemy’s Multi-Level Systemic and Co-Active Coaching Models
(With specific work from Linda Kohanov, Kathleen Barry Ingram and Karla McLaren)

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Orientation
Coaching From The Heart

What is Coaching
From the Heart?
Orientation Overview

What is Coaching?
- Performance-improvement dialogue
- A collaborative partnership of equals
- Focused, results-driven, feedback-oriented
- Requires curiosity, courage, commitment

Coaching From The Heart
- The heart is an extremely sensitive organ
- It produces an electromagnetic (EM) field
- The heart “entrains” (or dialogues) with other EM fields
- You can learn to sense your heart field
- You can learn to sense and connect with the heart fields of others
What is Coaching?

“What Coaching is a collaborative and focused performance-improvement dialogue based on disclosure and feedback, and deepened by curiosity, courage, and commitment.”

Coaching is distinct from disciplining, counseling, and delegating. While it offers a powerful problem-solving platform, it serves best for teaching, developing, and performance improvement. In the course of the ongoing coaching conversations, both parties are working together toward predetermined goals and performance improvement.

Collaborative: The best coaching seems to arise when the relationship is one of equals. It can be challenging for managers and reports to set aside their power differential, but once they decide to work together, coaching becomes easier. Consultants and mentors are subject-matter experts; they are expected to be prescriptive and directive. Coaches, however expert they may be, are partners with the person being coached for the length of the coaching conversation.

Focused: Effective coaches use restraint. It is important to focus on collaboratively agreed objectives. If the coaching sessions take on an agenda driven exclusively by the coach, the trust and rapport will be weakened, or even destroyed. Additionally, the coach must fight the acculturated, educated, and rewarded impulse to “rush to closure.” The gift of coaching is developing others; allow time for the person being coached to think, explore, and experiment.

Feedback dependent: Fulfilling, effective, learning conversations require feedback. Both parties must agree to speak their minds, and not mind read. Assumptions, expectations, and rationalizations are the building blocks of failed relationships. Give and elicit information in order to reach clear goals, uncover blind spots and barriers, and design effective action plans.

Disclosure: Regularly exchanging opinions, beliefs, and feelings immediately lessens threats or fears and increases the probability that the skills and resources of coach and the person being coached could focus on the work at hand. Disclosure affords openness to information, opinions and new ideas about oneself as well as about specific processes. As less energy is tied up in being defended there is greater likelihood of satisfaction with the work, and more involvement with improving performance.

Curiosity: A good coach has experience, ideas, opinions, and processes. A great coach has all these and an open mind; a beginners mind. Curiosity is a mental orientation toward new ideas and creative solutions. Even when the coach knows what to do, intentionally suspending the knowledge in favor of curiosity can produce novel or unique ideas and solutions.

Courage: Wherever coaching takes place, so does change. And wherever there is change there is discomfort, anxiety, and fear. A good coach has the courage to instigate change and the compassion to support a change-frightened person.

Commitment: Commitment is ongoing. Coaching rarely happens in 20 minutes. Time and multiple points of contact make coaching come alive. A single conversation can be insightful, motivating, or educational. But coaching for performance and change takes as long as it takes to learn, and that means repetition, patient instruction, and regular review.

Coaching challenges people to reach beyond their comfort zone, and challenges coaches to be attentive and respect the pace, intelligence, and intuition of others. It produces great results not because it’s easy, but because of the discipline and courage it affords.
The Coaching Journey (from Masterful Coaching)

Masterful Coaching involves expanding people’s capacity to make a difference with individuals, their organizations, and their world. It involves impacting people’s visions and values and offering them a powerful assist in reinventing who they are being, their thinking, and behavior that is consistent with achieving what they need to achieve.

It is about changing people’s context or frame of reference. This is the back ground from which they live their lives.

Stages of Coaching
1. The beginner
2. Advanced beginner (does ok with supervision)
3. Competent (capable)
4. Virtuoso (brilliant)
5. Mastery (invents new rules, becomes legend)

Compass Points
1. Coaching is a powerful partnership
   a. chemistry
   b. listening for greatness
   c. coach stands committed in the face of breakdowns
   d. coach comes to each meeting with no other agenda than the client agenda
2. Stand in the future people want to create
   a. create some big hairy audacious goals that force people to challenge orthodoxies
   b. design a structure for fulfillment
   c. coach the person to be the leader to ‘source’ the future he/she has come up with
   d. extend people an “A” and then coach them to show up that way
3. Leaders must reinvent themselves first
   a. coach people to reinvent themselves rather than reduce their vision when they hit the inevitable roadblocks
   b. coach beyond the predictable future to the possible future
4. Be a thinking partner
   a. sounding board, inquirer
5. Expand people’s ability to take successful action
   a. a valuable coaching relationship or session creates a clearing for them to have not only powerful insights, but to also take effective actions.
   b. single, double and triple loop learning.
   c. hold people accountable, celebrate accomplishments.
The Heart as an Organ of Perception

Stephen Harrod Buhner

Remember what it’s like to see a puppy walking slowly along, sniffing the ground, tail wagging, small body slightly askew? Something pulls you toward the puppy, so you say, “Here, boy, over here,” and the puppy looks up, sees you, and bounds over. In that moment, it’s as if something leaves the puppy and enters you and something in you leaves your body and touches the puppy. You want nothing more than to hold each other and enjoy the warmth of your closeness.

We have this experience almost daily, with our dear friends, our children, and our mates. If we’re lucky, we may feel it with a special piece of land, an old-growth tree, or a great ancient stone. It is one of the most real experiences we have, a particular kind of intimacy, yet we have no word for it in our language.

It is this moment of intangible touch that I’ve been exploring for the past 36 years as a psychotherapist, herbalist, and teacher. What would it be like to feel this every day, with everything, I wondered? What exactly is it and how could I create and sustain it?

It took me decades to find the answers to these questions. The ancient Greeks knew it well. They called it aesthesis, which means “to breathe in.” They recognized that the moment of touch was accompanied by a gasp, a particular kind of inspiration. They considered it the moment when the soul essence inside us, and the soul essence from something outside us, met and mingled. It is the root of our word “aesthetic.”

Years into my studies, I also began to connect something else to this experience. Indigenous peoples who still live close to the earth experience life very differently than we do in the West; they seem to perceive things that we cannot see, things that they are surprised we do not perceive. The explanation for this is simple, but profound: when you ask them where in the body they live, they gesture to the region of their hearts, while modern Westerners typically point to their heads. Perhaps the great lyrical writer Antoine de Saint-Exupéry had some insight into this phenomenon when he wrote, “And now here is my secret, a very simple secret. It is only with the heart that one can see rightly; what is essential is invisible to the eye.”

Meaning Is in the Molecules

Consciousness studies in the late sixties focused almost entirely on the brain, in part because conventional wisdom held that it is our brain that distinguishes us from Earth’s other inhabitants. In the decades that followed, however, a few researchers worked without this preconception. Rollin McCraty at the HeartMath Institute is one; he began to look at the heart and its role in cognition and awareness. He and others suspected that consciousness might be mobile and that it might inhabit different locations in the body other than the brain.

One of the most important findings that emerged from these studies was the concept that our organs and bodies are highly complex “nonlinear” organisms in which the whole is far more than the sum of the parts. As Ary L. Goldberger, M.D., director of the Rey Laboratory and professor of medicine at Harvard University, put it: “The body is a complicated symphonic system, much like nature itself... on linear systems composed of multiple subunits [such as the body] cannot be understood by analyzing these components individually.”
To understand such nonlinear systems, it’s helpful to look at the behavior of molecules. Researchers have found that when billions of molecules are enclosed in a container, their movements are at first random. But at some moment that can never be predicted, all the molecules spontaneously synchronize and begin to move and vibrate together as one coordinated whole, or system. In that moment of synchronicity, something comes into being that is more than the sum of its parts. And that something — call it the soul of the thing — cannot be found in any of the parts.

At that moment of synchronicity, the new system also begins to display what are called emergent behaviors as it acts on the parts, or subunits, to stimulate further, more complex synchronizations. A continuous stream of very rapid information — in the form of temperature fluctuations, velocity, pressure, chemical, electric, magnetic — begins to flow from the parts to whole and from the whole back to the parts in order to stabilize the system, according to Stanford University biologist Jan Walleczek. The meanings within the molecules, called the electromagnetic (EM) signature, tell the receiving organisms how these inputs affect its state of being. These meanings are analyzed and integrated into the organism, and a response is initiated.

All living systems work this way, retaining an exquisite sensitivity to disturbances of their equilibrium. They remember this equilibrium because they are highly intelligent and possess a soul force, this thing that comes into being that is more than the sum of the parts.

The heart is such a nonlinear, self-balancing system. It possesses self-organization and emergent behaviors. It functions not only as a powerful endocrine gland, but also as a unique kind of brain — a cognitive and perceptual organ, and a powerful electromagnetic generator and receiver.

**The Field of the Heart**

The heart contains pacemaker cells that set its beat. At the moment of self-organization, the first pacemaker cell begins pulsating and oscillating at a regular rhythm. Every new cell “hooks” itself to this one and begins beating in time with the first. This is called entrainment. As individual pacemaker cells couple by the millions, new and unique perceptual capacities come into being. As Goldberger notes, “Nonlinear coupling generates behaviors that defy explanation using traditional (linear) models.”

When the heart is fully online, it produces an electromagnetic field much larger than that which is created by the aggregate of the individual cells. The field is 5,000 times stronger than the brain’s and can be detected by sensitive scientific instruments up to 10 feet away. It is strongest from the body’s surface to 18 inches away, but continues indefinitely into space, like radio waves, according to biologists like Mae-Wan Ho at the Institute of Science in Society.

Not only do heart cells entrain with each other; the heart also entrains with other electromagnetic fields it encounters. When two heart fields oscillate in unison, there is a rapid exchange of information, resulting in alterations in heart function, hormonal cascade, and physiology generally. A kind of dialogue begins.

When the heart field of a healer and a patient meet, for example, the electrocardiograph (ECG) or heart pattern of the healer can be found in both the ECG and electroencephalograph or brain patterns of the patient, according to research by Rollin McCraty. The heart field of the healer literally paces the patient into new patterns of health.
Heart entrainment is natural to us, occurring at the earliest stage of life. In the womb, the infant’s heart entrains with the mother’s and continues to do so after birth, writes Joseph Chilton Pearce in his book *The Biology of Transcendence*. The mother’s electromagnetic field is filled with information and meaning, including how she feels about her infant. In fact, our feelings always affect the information encoded in our hearts’ wave patterns. Babies, like all living systems, take in and decode this information. We remain sensitive to these fields after birth because we have gestated in the midst of this kind of language. Once born we routinely, often unconsciously, scan encountered fields for information. The way we as humans encounter these fields is unique: we experience them as emotions.

In essence, the heart is an extremely sensitive organ whose domain, we instinctively know, is feeling. Recent research reveals why: our heart processes a particular and unique EM bandwidth with complex signals that we experience as unique emotional complexes. These EM signals, taken in through the heart, are processed in the brain in the same manner as our conventional senses such as sight and smell. Unfortunately, this kind of emotional perception of the world starts to atrophy in most of us when we begin locating consciousness in the brain, rather than in the heart.

**The Heart-Mind Information Superhighway**

Living organisms possess extremely complex electromagnetic fields that encode everything about the organism: its health, history, potential, and more. When the EM field passes into and through the heart, the information is then routed to the brain, which analyzes the information and extracts the meaning from the EM signature.

The heart can act as a “mind” or an organ of perception because approximately 60 percent of heart cells are neural cells, which function similarly to those in the brain. They cluster in ganglia and connect to the neural network of the body through axon-dendrites. This is not an accident. The heart has direct connections to specific centers of the brain and these connections create a direct, unmediated flow of information from the heart, according to research by Gary Schwartz, professor of psychology at the University of Arizona, and Linda Russek of the Heart Science Foundation. The heart, in fact, is hard-wired into the amygdala, thalamus, hippocampus, and cortex — brain centers involved with emotional memories, sensory experience, the extraction of meaning from sensory inputs, problem solving, reasoning, and learning. To enhance communication with the brain and central nervous system, the heart also makes and releases its own neurotransmitters as it needs them.

The mind-heart connection is further enhanced by a state called “heart coherence,” according to McCraty. During coherence, the heart’s rhythm sets the beat for the entire body and the heart waves increase in amplitude, giving the heart field greater depth and power. Coherence also brings an immediate change in brain function. Large populations of cells in the forebrain begin to oscillate to the heart’s rhythm, and the brain waves ride on top of the heart waves. The perception of those brain cells — the kinds of information they process — is very different than when consciousness is located in the heart.

As brain function changes, so does what we see and learn. What people perceive when they live from the heart is quite different from what they perceive when they live in the head. In coherence, a whole new world opens, and things not normally perceived become commonplace.

When someone in a state of heart coherence allows his or her heart field to entrain or merge with another EM field, the rapid download of information between the organisms happens naturally. While this information...
download occurs in a language of its own, it rarely happens in words. In one sense, it can be thought of as a
direct conveyance of meaning without language. Information flows through the heart first and is then routed to
the brain where it is translated, much as radio receivers convert radio waves into music. But in humans, the
process is more complex, as the brain translates sensory data, memories, experiences, and knowledge into
sound, image, touch, taste, odor.

From these translations of sensory forms, which are shaped by the culture in which we are raised, come
meaning.

**The Shape of the Heart Field**

We all live immersed in meaning-filled fields of information. These fields flow into us from the moment of our
birth. We experience these fields not as a stream of words on a page but as emotions, the touch of life upon us.
This interchange, rooted in our hearts, alters our lives, shapes its quality, and reminds us that we are never
alone. It reconnects us to the ground of being from which we come and nurtures in us a natural empathy with
the world around us. We are one intelligent organism among many, one en-souled form amid a multitude.

Heart cognition moves us from a rational orientation in a dead, mechanized universe to one in which the unique
perceptions and emotions are noticed and strengthened. It allows us to deeply experience the living soulfulness
of the world, constantly reweaving us back into the fabric of life. We may be out of practice, but our capacity to
perceive from the heart comes naturally to us, and it never disappears. As I’ve explained, we are made for the
unique nature of each thing to pass into us through our hearts, which store memories of this thing, and engage it
in dialogue.

With practice, it is possible to learn the shape of your heart field as well as you know your own hands, and use
your heart as you do your hands to touch the world around you. It is also possible to entrain with other EM
fields intentionally, allowing the information in these fields to pass into you in the form of information you can
use. It is, after all, as natural to us as the beating of our hearts. Ancient and indigenous peoples, locating
consciousness in the heart, commonly experience aesthesis as a regular part of life. They know those moments
when there is a blending in the soul essence of two living things, when the human begins to know the
nonhuman directly from itself.

**Why We Can Talk to Plants**

This ancient knowing explains how these people learn direct depth healing of human disease and the use of
medicinal plants: a blending of the EM fields between human and plant occurs of its own accord, a moment of
synchronicity when information is directly exchanged. Often, this blending is experienced as a visionary or
dream state. Manuel Cordova-Rios, the great Amazonian healer from Peru, describes one such moment: “In
infinite detail her internal organs appeared on the screen of my vision. As the liver came into my sight, it was
obvious from its black color that it had ceased to function and I knew that it was no longer serving to purify the
blood. As this became clear to me I turned my attention to the remedy and the appropriate plants appeared in
my vision — flowers from the retama tree and roots from the retamilla shrub. As the visions faded off into more
general dreams, I knew it was possible for her to recover.”

This direct exchange is how the German poet and botanist Goethe discovered the “pregnant point” and,
cultivating it, came to his understanding of plant metamorphosis: that all parts of a plant — pistils, stamens,
stems — are merely leaf morphed into different shapes. “He who sees into the secret inner life of the plant, into the stirring of its powers, and observes how the flower gradually unfolds itself, sees the matter with quite different eyes — he knows what he sees,” wrote Goethe.

This is how the great agriculturalist Luther Burbank was able to coax new food plants into existence in two or three years and, trotting down rows of 20,000 seedlings, could pick the seven that would breed true. From him came many of the domesticated plants that we take for granted as food. It was sensitivity, he explained, that “partly accounts for my unusual success in selecting between two apparently identical plants or flowers or trees or fruits.”

This is how Masanobu Fukuoka, the great Japanese farmer, equals the yields of technological farming without fertilizers, weeding, or tilling the soil. He taught himself to understand the true nature of barley from within itself, to grow it under the unique conditions of his own field, and to see the human from the barley’s point of view. “Only to him who stands where the barley stands and listens well, will it speak and tell, for his sake, what man is,” said Fukuoka.

Reductionist approaches are like concrete sidewalks. They suppress the wild, but the power of the green — veriditas as Hildegard of Bingen called it — always breaks through. When we locate consciousness in the brain, we reduce the breadth of full perception and thought to a narrow band. Everything else is relegated to the realm of superstition or heresy. But when we reclaim the heart as an organ of perception and cognition, we feel first and then know — the oldest way of being human.

**Sensing Your Heart Field**

Have a friend stand six feet away. Walk up to him or her slowly. When you’re 12 to 18 inches away, you will suddenly experience being in this person’s “space.” Your two heart fields are touching. Once you get to know the feel of your field, you can learn to extend it out from yourself and use it like sensitive fingers to touch the world around you.

**Learning to Think with Your Heart in Four Steps**

1. Focus on a natural object, such as a plant or a flower or a piece of fruit. Notice its appearance, its colors and shadings. Immerse yourself in its sensory aspects (or, put another way, come to your senses). This is the first step in getting out of your head.

2. Continue to look at the object before you and ask yourself, “What does it feel like?” This activates the heart as an organ of perception and helps naturally to shift your attention to the object’s electromagnetic field. You will then experience a unique feeling complex, which you probably can’t name, as the object’s electromagnetic signature moves through your heart.

3. Allow the feeling to fill you. Breathe through and with the feeling while continuing to focus on the object in front of you. Notice how your breathing has slowed, your vision slips into softer focus, colors seem to brighten, and your body relaxes. These physiological shifts always accompany the movement into heart-centered perception.
4. Reach out with your heart field and hold the thing in front of you. Allow yourself to feel a sense of caring for it (this creates specific alterations in the EM field of the heart). As you do this, the two fields will entrain, and you will feel a flow of energy between you and it. If you do this with a plant, you might at this point ask it to tell you about itself. George Washington Carver used this process to deepen his understanding of food plants such as the peanut. “Anything will give up its secrets,” he said, “if you love it enough.”

Stephen Harrod Buhner is an herbalist, psychotherapist, and teacher. He is the author of many books, including *The Secret Teachings of Plants: The Intelligence of the Heart in the Direct Perception of Nature and Sacred Plant Medicine.*

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The Heart's Electromagnetic Field

This figure, provided by the Institute of HeartMath, depicts the heart's electromagnetic field--by far the most powerful rhythmic field produced by the human body--not only envelops every cell of the body but also extends out in all directions into the space around us. The cardiac field can be measured several feet away from the body by sensitive devices. Research conducted at IHM suggests that the heart's field is an important carrier of information.

The heart is the most powerful generator of electromagnetic energy in the human body, producing the largest rhythmic electromagnetic field of any of the body's organs. The heart's electrical field is about 50 times greater in amplitude than the electrical activity generated by the brain. This field, measured in the form of an electrocardiogram (ECG), can be detected anywhere on the surface of the body. Furthermore, the magnetic field produced by the heart is more than 5,000 times greater in strength than the field generated by the brain, and can be detected a number of feet away from the body, in all directions, using SQUID-based magnetometers (as shown above). Research conducted at IHM suggests that the heart's field is an important carrier of information.

IHM refers to the heart's energetic communication as cardioelectromagnetic communication.
Module 1
Core Competencies

ICF Core Competencies
Five Coaching Contexts
Module 1 Overview

Pre-Reading Assignment
- The ICF Core Competencies
- Five Coaching Contexts

ICF Core Competencies
- Setting the Foundation
- Co-Creating the Relationship
- Communicating Effectively
- Facilitating Learning and Results

Five Coaching Contexts
- Listening
- Intuition
- Curiosity
- Forward and Deepen
- Self-Management

Coaching Demo Call #1
- Review Core Competencies - Setting the Foundation
- Coaching Demo on Setting the Foundation
- Coaching Exercise
ICF PROFESSIONAL COACHING CORE COMPETENCIES

International Coach Federation

A. SETTING THE FOUNDATION
   1. MEETING ETHICAL GUIDELINES AND PROFESSIONAL STANDARDS
   2. ESTABLISHING THE COACHING AGREEMENT

B. CO-CREATING THE RELATIONSHIP
   3. ESTABLISHING TRUST AND INTIMACY WITH THE CLIENT
   4. COACHING PRESENCE

C. COMMUNICATING EFFECTIVELY
   5. ACTIVE LISTENING
   6. POWERFUL QUESTIONING
   7. DIRECT COMMUNICATION

D. FACILITATING LEARNING AND RESULTS
   8. CREATING AWARENESS
   9. DESIGNING ACTIONS
   10. PLANNING AND GOAL SETTING
   11. MANAGING PROGRESS AND ACCOUNTABILITY
A. SETTING THE FOUNDATION

1. Meeting Ethical Guidelines and Professional Standards - Understanding of coaching ethics and standards and ability to apply them appropriately in all coaching situations
   - Understands and exhibits in own behaviors the ICF Standards of Conduct (see list, Part III of ICF Code of Ethics),
   - Understands and follows all ICF Ethical Guidelines (see list),
   - Clearly communicates the distinctions between coaching, consulting, psychotherapy and other support professions,
   - Refers client to another support professional as needed, knowing when this is needed and the available resources.

2. Establishing the Coaching Agreement - Ability to understand what is required in the specific coaching interaction and to come to agreement with the prospective and new client about the coaching process and relationship
   - Understands and effectively discusses with the client the guidelines and specific parameters of the coaching relationship (e.g., logistics, fees, scheduling, inclusion of others if appropriate)
   - Reaches agreement about what is appropriate in the relationship and what is not, what is and is not being offered, and about the client's and coach's responsibilities,
   - Determines whether there is an effective match between his/her coaching method and the needs of the prospective client.

B. CO-CREATING THE RELATIONSHIP

3. Establishing Trust and Intimacy with the Client - Ability to create a safe, supportive environment that produces ongoing mutual respect and trust
   - Shows genuine concern for the client's welfare and future,
   - Continuously demonstrates personal integrity, honesty and sincerity,
   - Establishes clear agreements and keeps promises,
   - Demonstrates respect for client's perceptions, learning style, personal being,
   - Provides ongoing support for and champions new behaviors and actions, including those involving risk taking and fear of failure,
   - Asks permission to coach client in sensitive, new areas.

4. Coaching Presence - Ability to be fully conscious and create spontaneous relationship with the client, employing a style that is open, flexible and confident
   - Is present and flexible during the coaching process, dancing in the moment,
   - Accesses own intuition and trusts one's inner knowing - "goes with the gut",
   - Is open to not knowing and takes risks,
   - Sees many ways to work with the client, and chooses in the moment what is most effective,
   - Uses humor effectively to create lightness and energy,
   - Confidently shifts perspectives and experiments with new possibilities for own action,
   - Demonstrates confidence in working with strong emotions, and can self-manage and not be overpowered or enmeshed by client's emotions.
C. COMMUNICATING EFFECTIVELY

5. Active Listening - Ability to focus completely on what the client is saying and is not saying, to understand the meaning of what is said in the context of the client's desires, and to support client self-expression
- Attends to the client and the client's agenda, and not to the coach's agenda for the client,
- Hears the client's concerns, goals, values and beliefs about what is and is not possible,
- Distinguishes between the words, the tone of voice, and the body language,
- Summarizes, paraphrases, reiterates, mirrors back what client has said to ensure clarity and understanding,
- Encourages, accepts, explores and reinforces the client's expression of feelings, perceptions, concerns, beliefs, suggestions, etc.,
- Integrates and builds on client's ideas and suggestions
- "Bottom-lines" or understands the essence of the client's communication and helps the client get there rather than engaging in long descriptive stories,
- Allows the client to vent or "clear" the situation without judgment or attachment in order to move on to next steps.

6. Powerful Questioning - Ability to ask questions that reveal the information needed for maximum benefit to the coaching relationship and the client
- Asks questions that reflect active listening and an understanding of the client's perspective,
- Asks questions that evoke discovery, insight, commitment or action (e.g., those that challenge the client's assumptions),
- Asks open-ended questions that create greater clarity, possibility or new learning
- Asks questions that move the client towards what they desire, not questions that ask for the client to justify or look backwards.

7. Direct Communication - Ability to communicate effectively during coaching sessions, and to use language that has the greatest positive impact on the client
- Is clear, articulate and direct in sharing and providing feedback,
- Reframes and articulates to help the client understand from another perspective what he/she wants or is uncertain about,
- Clearly states coaching objectives, meeting agenda, purpose of techniques or exercises,
- Uses language appropriate and respectful to the client (e.g., non-sexist, non-racist, non-technical, non-jargon),
- Uses metaphor and analogy to help to illustrate a point or paint a verbal picture.

D. FACILITATING LEARNING AND RESULTS

8. Creating Awareness - Ability to integrate and accurately evaluate multiple sources of information, and to make interpretations that help the client to gain awareness and thereby achieve agreed-upon results
- Goes beyond what is said in assessing client's concerns, not getting hooked by the client's description,
- Invokes inquiry for greater understanding, awareness and clarity,
- Identifies for the client his/her underlying concerns, typical and fixed ways of
perceiving himself/herself and the world, differences between the facts and the interpretation, disparities between thoughts, feelings and action,

• Helps clients to discover for themselves the new thoughts, beliefs, perceptions, emotions, moods, etc. that strengthen their ability to take action and achieve what is important to them,
• Communicates broader perspectives to clients and inspires commitment to shift their viewpoints and find new possibilities for action,
• Helps clients to see the different, interrelated factors that affect them and their behaviors (e.g., thoughts, emotions, body, background),
• Expresses insights to clients in ways that are useful and meaningful for the client,
• Identifies major strengths vs. major areas for learning and growth, and what is most important to address during coaching,
• Asks the client to distinguish between trivial and significant issues, situational vs. recurring behaviors, when detecting a separation between what is being stated and what is being done.

9. Designing Actions - Ability to create with the client opportunities for ongoing learning, during coaching and in work/life situations, and for taking new actions that will most effectively lead to agreed-upon coaching results

• Brainstorms and assists the client to define actions that will enable the client to demonstrate, practice and deepen new learning,
• Helps the client to focus on and systematically explore specific concerns and opportunities that are central to agreed-upon coaching goals,
• Engages the client to explore alternative ideas and solutions, to evaluate options, and to make related decisions,
• Promotes active experimentation and self-discovery, where the client applies what has been discussed and learned during sessions immediately afterwards in his/her work or life setting,
• Celebrates client successes and capabilities for future growth,
• Challenges client's assumptions and perspectives to provoke new ideas and find new possibilities for action,
• Advocates or brings forward points of view that are aligned with client goals and, without attachment, engages the client to consider them,
• Helps the client "Do It Now" during the coaching session, providing immediate support,
• Encourages stretches and challenges but also a comfortable pace of learning.

10. Planning and Goal Setting - Ability to develop and maintain an effective coaching plan with the client

• Consolidates collected information and establishes a coaching plan and development goals with the client that address concerns and major areas for learning and development,
• Creates a plan with results that are attainable, measurable, specific and have target dates,
• Makes plan adjustments as warranted by the coaching process and by changes in the situation,
• Helps the client identify and access different resources for learning (e.g., books, other professionals),
• Identifies and targets early successes that are important to the client.
11. Managing Progress and Accountability - Ability to hold attention on what is important for the client, and to leave responsibility with the client to take action

- Clearly requests of the client actions that will move the client toward their stated goals,
- Demonstrates follow through by asking the client about those actions that the client committed to during the previous session(s),
- Acknowledges the client for what they have done, not done, learned or become aware of since the previous coaching session(s),
- Effectively prepares, organizes and reviews with client information obtained during sessions,
- Keeps the client on track between sessions by holding attention on the coaching plan and outcomes, agreed-upon courses of action, and topics for future session(s),
- Focuses on the coaching plan but is also open to adjusting behaviors and actions based on the coaching process and shifts in direction during sessions,
- Is able to move back and forth between the big picture of where the client is heading, setting a context for what is being discussed and where the client wishes to go,
- Promotes client's self-discipline and holds the client accountable for what they say they are going to do, for the results of an intended action, or for a specific plan with related time frames,
- Develops the client's ability to make decisions, address key concerns, and develop himself/herself (to get feedback, to determine priorities and set the pace of (earning, to reflect on and learn from experiences),
- Positively confronts the client with the fact that he/she did not take agreed-upon actions.
Five Coaching Contexts  
*(From Co-Active Coaching)*

1. **Listening**
   a. Level I—this level is about the words only. It is internal listening; we are hearing the words and making sense of them internally. As a coach, we hear the words and make sense of them internally. The coachee says the words and hears themselves.
   b. Level II—this level is about the words as well, but includes the coach listening beyond these words. What is the story behind the words? What is not being said?
   c. Level III—this level is about the entire system around the coach, coachee, the words and the story. This is a ‘meta’ level of listening. It includes not only our ears, but all of our senses. This is systemic, energetic, somatic and intuitive listening.
   d. Level IV—listening from a place of intersubjectivity. *Equine Alchemy’s Multi-Level Systemic Coaching Model*

2. **Intuition**
3. **Curiosity**
4. **Forward and Deepen**
5. **Self-Management - Managing ourselves**—Coaching is not about the coach!! It is all about the client and their agenda, possibilities and outcomes. Your role as coach is to be as supportive as possible while remaining almost invisible!
Module 2

Co-Active Coaching Model
Module 2 Overview

Pre-Reading Assignment
- Book: *Co-Active Coaching*, Part I and Part II (pgs. 1 – 113)
- “What is Co-Active Coaching?” (electronic handout).
- The Co-Active Coaching Model (page 8) (electronic handout).

The Coactive Coaching Model
- The Model
- Levels of Listening
  - Level 1—Internal Listening
  - Level 2 – Focused Listening
  - Level 3 – Global Listening
  - Level 4 – Intersubjectivity
- Coachings Skills for Listening
  - Articulating
  - Clarifying
  - Meta-View
  - Metaphor
  - Acknowledging

Coaching Demo Call #2
- Core Competencies 1 & 2, “Setting the Foundation and Co-Creating the Relationship
- Coaching Contexts focus: Curiosity, Listening, Intuition
Levels of Listening

Level I—Internal Listening
- What does this mean to me?

Level II—Focused Listening
- Sharp Focus on the other person
- As coach, your awareness is totally on your client

Level III—Global Listening
- Like a radio field
- Intuitive
- Includes action and inaction

Level IV Listening—Intersubjectivity—Equine Alchemy’s MLSC Model
- Sharing of the same truth
- Paying attention to your own nonverbal experiences and body language cues and those you are interacting with at the same time
- Experiencing, Witnessing and Giving/Receiving Feedback = Coaching

Coaching Skills for Listening

Articulating
- Succinctly describe what is going on
- Without attachment to being right

Clarifying
- Listening, asking and reframing
- Without jumping to conclusions

Meta-View
- Presents the big picture and opens up room for perspective
- A great way to provide context

Metaphor
- Draws on imagery and experience to help client comprehend faster and more easily

Acknowledging
- Strengthens the client’s foundation
- Addresses who the client is
Module 3
Structures and Questions

Structures that Inform the Coaching Conversation, CPR, Powerful Questions, Introduction to Coaching Triads
Module 3 Overview

Pre-Reading Assignment
- Structures that Inform the Coaching Conversation (electronic handout)
- Context, Purpose, Results (CPR) (Electronic Handout)
- From the website: http://www.thecoaches.com/docs/resources/toolkit/login.html read the document “Powerful Questions”

Homework: Alain Cardon’s Question Skills in Coaching:

Structures that Inform the Coaching Conservation
- Ambivalence
- Authority
- Abandonment
- Alienation
- Integration
- Abundance

CPR
- Results
- Purpose
- Context

Powerful Questions

Questions Skills in Coaching
- Question Focus
- Client Frame of Reference
- Types of Questions

Coaching Demo Call #3
- ICF Core Competency #3 Communicating Effectively
- Demonstration of the Peer Coaching Triad with CPR Coaching
Structures That Inform the Coaching Conversation

Most of us generally operate out of a predominant, or default, structure made of thoughts, beliefs, feelings, perceptions and behaviors. Such structures influence the way we view our world and respond to situations and persons in our world. Coaches can benefit from becoming familiar with these structures so that they are easily recognized in the client’s story. It is helpful to us, as coaches, to identify our own default structure so that we are able to discern what belongs to us in the coaching conversation.

AMBIVALENCE
When someone is always struggling to make decisions or can’t decide which alternatives will yield the desired results, there is a constant state of confusion and uncertainty. Of all the structures, this is the safest one from which to operate because there is less to lose. One lives a life of mediocrity and moderation, never really going after anything, and remains in a never ending loop of deferred decision-making. The underlying fear in this structure is the projected consequences of making the wrong decision.

AUTHORITY
When someone can’t handle the “rules” or being told what to do, being directed or ordered, resistance usually manifests. Control, competition and conflict are all parts of this structure and they all involve a vying for power or freedom. The Authority structure often shows up as someone who refuses to do anything that they are told to do, simply because they are told to do it. No matter how you slice it, someone operating from the Authority structure believes his/her fate is always determined by someone or something else. The victim role fits into this structure, as it’s the opposite of dominant or feeling a total lack of authority.

ABANDONMENT
When someone is either feeling afraid of loss of another person or thing, or of leaving a person, fear arises. This structure doesn’t allow an individual to experiment or take risks, because there is always the possibility of loss and failure…and consequently, trauma. Loss of everything at any moment is a possibility, so the individual holds on more tightly to the present circumstances, however toxic or dysfunctional. In the Abandonment structure, few risks, if any, are taken. Behind the Abandonment structure is the lesson of letting go and accepting that everything is temporary.

ALIENATION
When someone isolates themselves, they cannot become part of a community for fear of rejection, disappointment or feeling superior. This individual may not possess adequate social skills, or does not know how or want to be part of a team. An individual living out of the Alienation structure feels independent and self-sufficient and does not see the value of group effort or of sharing with another person. This structure usually shows up in people who feel unloved or incapable of loving. Mistrust is a manifestation of this structure; it is about separateness, lack of fulfillment and isolation. The Alienation structure is the most prevalent structure.

INTEGRATION
When someone comes from a place of wholeness, they are not compartmentalizing their ideas and their life. The individual who is operating from the Integration structure experiences clarity around what is important to them and what is not.

ABUNDANCE
When someone is secure and confident about who they are and can give freely without needing or wanting anything in return, we can note the individual is operating from the Abundance structure. The challenge in this structure is in keeping one’s focus, clear intention and direction. In order to use this structure most effectively, one must be focused, clear, and mindful.

*based on the work of Marion Franklin, MCC and Tony Kirkland, MA
CPR (Context, Purpose, Results)

CPR is a powerful tool to focus clearly on what you would like to attain from an event, a project, a meeting, or an action. By clearly stating all the results you would like to achieve, stating the purpose of the activity, and developing a context from which to operate, you focus your intent powerfully and take a direct path to where you wish to go.

Step 1—Make a list of all the results you would like to obtain as a result of the activity. This list should be as rich, deep and varied as possible. Include things like “have fun, develop relationships, breathe well...” as well as the more obvious, concrete results that you are after. The test of a result is: “Is it attainable? (is the result something that can happen as a result of the activity?); Is it measurable? (How do we know if we got it?)”

Step 2—Make a clear statement of the purpose of the activity. The purpose is a statement of the “why?” of the activity. It should be as broad and encompassing as possible—your big purpose, or that of your organization.

Step 3—Write a statement of your context for the activity. The context is a statement you believe to be true or you wish to be true that contains all the results you wish to obtain. It is the state of mind or mind-set that you bring to the activity; the place from which you operate. If things are not going your way— return to your context.

Part of the “magic” of CPR’s is that by holding a context large enough to contain all your results, the results are arrived at in a holistic way rather than linearly. They are interwoven and interdependent. You don’t have to pound each one out individually.
Powerful questions are provocative queries that put a halt to evasion and confusion. By asking the powerful question, the coach invites the client to clarity, action, and discovery at a whole new level. As you can see from the following examples, these generally are open-ended questions that create greater possibility for expanded learning and fresh perspective.

**Anticipation**
What is possible?
What if it works out exactly as you want it to?
What is the dream?
What is exciting to you about this?
What is the urge? What does your intuition tell you?

**Assessment**
What do you make of it?
What do you think is best?
How does it look to you?
How do you feel about it?
What resonates for you?

**Clarification**
What do you mean?
What does it feel like?
What is the part that is not yet clear?
Can you say more?
What do you want?

**Elaboration**
Can you tell me more? What else?
What other ideas/thoughts/feelings do you have about it?

**Evaluation**
What is the opportunity here?
What is the challenge?
How does this fit with your plans/way of life/values?
What do you think that means?
What is your assessment?

**Example**
What is an example?
For instance?
Like what?
Such as?
What would it look like?

**Exploration**
What is here that you want to explore?
What part of the situation have you not yet explored?
What other angles can you think of?
What is just one more possibility?
What are your other options?
What is your desired outcome?

**For Instance**
If you could do it over again, what would you do differently?
If it had been you, what would you have done?
How else could a person handle this?
If you could do anything you wanted, what would you do?

**Fun as Perspective**
What does fun mean to you?
What was humorous about the situation?
How can you make this more fun?
If you were to teach people how to have fun, what would you say?

**History**
What caused it?
What led up to it?
What have you tried so far?
What do you make of it all?
Implementation
What is the action plan?
What will you have to do to get the job done?
What support do you need to accomplish it?
What will you do?
When will you do it?

Integration
What will you take away from this?
How do you explain this to yourself?
What was the lesson?
How can you make sure you remember what you have learned?
How would you pull all this together?

Learning
If your life depended on taking action, what would you do?
If you had free choice in the matter, what would you do?
If the same thing came up again, what would you do?
If we could wipe the slate clean, what would you do?
If you had it to do over again, what would you do?

Options
What are the possibilities?
If you had your choice, what would you do?
What are possible solutions?
What will happen if you do, and what will happen if you don’t?
What options can you create?

Outcomes
What do you want?

Perspective
When you are ninety-five years old, what will you want to say about your life?
What will you think about this five years from now?
How does this relate to your life purpose?
In the bigger scheme of things, how important is this?
So what?

Planning
What do you plan to do about it?
What is your game plan?
What kind of plan do you need to create?
How do you suppose you could improve the situation?
Now what?

Predictions
How do you suppose it will all work out?
What will that get you?
Where will this lead?
What are the chances of success?
What is your prediction?

Resources
What resources do you need to help you decide?
What do you know about it now?
How do you suppose you can find out more about it?
What kind of picture do you have right now?

Starting the Session
What’s occurred since we last spoke?
What would you like to talk about?
What’s new/the latest/the update?
How was your week?
Where are you right now?

Substance
What seems to be the trouble?
What seems to be the main obstacle?
What is stopping you?
What concerns you the most about . . . ?
What do you want?

Summary
What is your conclusion?
How is this working?
How would you describe this?
What do you think this all amounts to?
How would you summarize the effort so far?

Taking Action
What action will you take?
And after that?
What will you do? When?
Is this a time for action? What action?
Where do you go from here?
When will you do that?
What are your next steps? By what date or time will you complete these steps?
Instructions for Peer Coaching Journal

The Peer Coaching Journal is designed to help you to reflect on your practice coaching sessions in order to capture and measure your progress. These journals are a required assignment in order to complete your certification process.

Logistics:
- The peer coaching practice session is 90 – 120 minutes (depending on how you use your time).
- Each coaching session should last approximately 20 minutes.

Each session requires 3 people in a group:
- A Coach
- A Coachee (Client)
- A Witness (Observer)

Each person will fulfill each of the above roles during a session.

Process:
- You are responsible for contacting the other members of your group and setting up the conference line or Skype information. If you don’t already have these services you can get them for free at http://www.freeconferencecall.com/free-international-conference-call or www.skype.com.
- Determine ahead of your peer coaching session who will be the first, second and third coach, coachee and witness. This will make for a smooth transition in between your 20-minute practice sessions.

Protocol:
1. The first coach emails the coachee and observer the conference # at least 24 hours ahead of time. (You can all use the same number for each round if you wish)
2. All 3 participants dial-in at the scheduled time; once everyone is on the line the coach will proceed with the coachee for approximately 20 minutes. If the session goes more than 20 minutes the observer will call time.
3. At the end of each coaching practice session take a few minutes to debrief with the coachee and observer. The order of feedback is as follows:  
   1. Coach
   2. Client (coachee)
   3. Observer
4. After the debrief everyone hangs up to take 5 minutes to write out your reflections of the experience.
5. Round two begins with the group dialing back in at the agreed time with the next coach and coachee. Again the observer of this round will call time if the session goes more than 20 minutes.
6. Same as above for round 3.

7. After the practice session, finish your journal reflections and email them to

**Optional:** You may wish to record your own coaching sessions to playback for yourself. (Recommended)
Equine Alchemy Coach Certification Program Peer Coaching Journal for Personal Reflections

NAME: ___________________________ DATE: ___________________________

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<th>Co-Creating the Relationship</th>
<th>Communicating Effectively</th>
<th>Facilitating Learning and Results</th>
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<tr>
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<td>• Coaching Presence</td>
<td>• Actively listening</td>
<td>• Creating Awareness</td>
</tr>
<tr>
<td>• Establishing the Coaching Agreement</td>
<td>• Being Present</td>
<td>• Powerful Questions</td>
<td>• Designing Action</td>
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<tr>
<td></td>
<td>• Connecting</td>
<td>• Direct Communication</td>
<td>• Planning and Goal Setting</td>
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</table>

As the Coach:
What worked?

What didn’t work?

What’s my stretch?

To deepen my learning, I will take on this inquiry:

To forward the action, I will:

As the Coachee (Client):
What did I notice about each area of the coaching process for myself? Did I experience a shift in perspective or come away with a measurable action plan? What new awareness (if any) occurred for me? What took place in the session that sparked that new awareness?

As the Observer:
What did I notice with regards to each area of the coaching skills? How did my listening shift? When did I notice the Coachee shift? What did I experience in my body? Where was the coach most powerful? Why was it powerful?
Module 4
The Role of Emotions in Coaching

Projection and Transference, Language of Emotions, Shadow Wisdom, the Johari Window
Setting Up the Coaching Agreement
Module 4 Overview

Pre-Reading Assignment
- Book: *Dark Side of the Light Chasers* (the whole book),
- Book: *The Language of Emotions* (Chapter 10 pgs. 125 - 158)
- Projection and Transference: What They Are, How They Work, and Their Gifts to Us (electronic handout)

Projection and Transference
- What They Are, How They Work, and Their Gifts to Us
- Projection and Transference Homework Lesson

The Language of Emotions
- Blue Ribbon Emotions
- Emotional Messages Chart

Shadow Wisdom
- Beyond the False Self
- The Johari Window

Setting Up A Successful Coaching Relationship

Coaching Demo Call #4
- Read the *Steps to Setting up a Successful Coaching Relationship* (electronic handout)
- Review The Co-Active Model Cornerstones Focus on the Whole Person, Evoking Transformation
  - Deepen and Forward and Self-Management
- Check in on Projection and Transference Homework Exercise
- Practice Coaching with a focus on the Messages Behind the Emotions
Projection and Transference:
What They Are, How They Work, and Their Gifts to Us

Transference
A state of psychological transference exists when a person’s thoughts and feelings regarding another person, animal, or group are strongly influenced by the emotions and attitudes originally occurring in significant past relationships. The person projects these old and now unconscious internalized feelings and thoughts onto the other as if they belonged to him/her. Transference can be of either positive or negative associations. Simply put, experiencing and reacting to a current relationship as if it were actually an old one.

Projection
Projection is occurring when one is experiencing an unconscious feeling, attitude or attribute of one’s own as if it were coming from or exits in someone else. Projection reduces anxiety by having us see our unwanted subconscious impulses, attitudes or desires without letting the conscious mind recognize them as our own, thus keeping us unaware of those hidden and uncomfortable parts or potentials in ourselves.

In essence then, by recognizing and owning our projections, we are “mining the gold and the darkness [personal truth] in your shadow as a path to growth, evolution and conflict resolution.” R. Johnson.

How So and Why?

• Opening to what we don’t know about ourselves enables greater self-awareness and understanding, and ultimately promotes a compassionate level of self-acceptance.

• Because they are unconscious processes, they are very, very difficult to look at and own – that’s why they have been relegated to the unconscious in the first place! But remember, this is not about self-judgment! It is about self-awareness and taking responsibility for who we are, what we believe and how we behave.

• The value of going through what probably will be a painful/challenging process of reclaiming our projections (especially to our ego’s self image) is a release of dysfunctional or limiting views of ourselves and reality. We can discover what we are blind to in ourselves. “By finding a way to hide or avoid aspects of ourselves, by definition we’re not enabling ourselves to be fully human. … R. Johnson

• People will turn up at workshops who will be projecting/transferring – onto us or others in the workshop – and we need to be savvy about what is going on and be able to cope with the situation with knowledge and sensitivity.
Recognizing When Projecting or Transferring is Occurring.

The “tip off” that a projection or transference may be happening is when our emotional reaction to the other person, group or animal seems all out of proportion to the situation at hand (as opposed to the emotions on the Emotional Message Chart, which are at an appropriate level and offer a process for addressing the situation effectively). Once recognizing the possibility of a transference or projection, we can examine, with ruthless honesty, the situation for its personal truth. What about us is being revealed here? What can we take responsibility for that is our own – what we fear, hate, reject in the other that also belongs to us in some way, but until now has hidden in our unconscious? Once we know what it is, we can take responsibility for it, manage it, and benefit from it. When we do this, the level of arousal will diminish and we are able to relate to the other in a clearer, less charged way and take action that is not contaminated by unconscious energies.

Projection and transference are perfectly normal and everyday psychological dynamics that all human beings experience throughout their lives. Because they are unconscious processes, they can not be prevented. However, they can be recognized, understood, and mined for their gifts. The blessing of owning our shadow is a more conscious, loving and effective way of being in the world – a more fully human way of living.

Also interesting to know about Projection and Transference is that they only occur when the “screen” onto which they are projected HAS some of the quality that is being projected. Thus, 10% does belong to them, and we can leave it with them or address it with them, if need be. The other 90%, however, belongs to the projector (us) and is where the personal truth is to be found and embraced.

[By Mary-Louise Gould  3/09]
Projection and Transference Homework Exercise

1. What emotion are you most reluctant to feel and express?

2. What emotion are you reluctant to experience coming from others?

3. Are you more likely to make a judgment about their emotional responses or are you more likely to feel responsible for making them “feel better” as soon as possible? Or both?

4. Give an example of when you’ve engaged in transference.

5. Give an example of when you’ve engaged in projection.

6. Give an example of when an individual has projected something onto you that he or she is not able to see in themselves.

7. What actions are you willing to take to not only identify these challenges but to modify your responses to them?
Blue Ribbon Emotions
An Integration with
The Emotional Message Chart

The Emotional Chart developed at Epona Equestrian Services by Linda Kohanov has been an important piece of work in the study of both human and animal emotions and her work combined with Dr. Panksepp’s research really gives us an understanding of the importance of emotions for ourselves and all of those whom we are in relationship.

Dr. Jaak Panksepp, a neuroscientist at Washington State University who wrote the book “Affective Neuroscience”, is one of the most important researchers in the field studying emotions, the locations in the brain, and the incredible survival and pleasure seeking actions they elicit.

The work of Linda Kohanov inspired by the work of Karla McLaren’s book, “Emotional Genius” has informed many of us in the Equine Facilitated Learning field. The “blue-ribbon” emotions described by Panksepp scientifically and behaviorally describe the same emotions shared by humans and the entire animal world. Temple Grandin, one of the most reliable and significant observers of animal behavior, introduces Panksepp’s work in her book, “Animals Make Us Human” Creating the Best Life for Animals.

Panksepp calls the core emotion systems the “blue-ribbon emotions” because they “generate well-organized behavior sequences that can be evoked by localized electrical stimulation of the brain”. This means that when you stimulate the brain systems for one of the core emotions, you always get the same behaviors from the animal. If you stimulate the anger system, the animal snarls and bites. If you stimulate the fear system, the animal freezes or runs away. Electrodes in the social attachment system cause the animal to make separation calls, and electrodes in the “SEEKING” system make the animal start moving forward, sniffing and exploring its environment. When you stimulate these parts of the brain in people, they don’t snarl and bite, but they report the same emotions the animals show. (p. 6-7)

The four blue-ribbon emotions systems are:

SEEKING
RAGE
FEAR
PANIC

(Panksepp always uses caps when referring to these emotions.) He writes about three other “positive” emotions which he calls “the more sophisticated special-purpose socio-emotional systems that are engaged at appropriate times in the lives of all mammals”. This includes humans and these emotions, like the other positive emotions we have, can only be felt and experienced if the other emotional systems are calm and not activated. I believe this is so important to validate our observations of people and animals that ignoring or invalidating the so called “negative emotions” cause people and animals to shut down and live a life as an automaton. He identifies these emotions as: LUST (the sexual urge to procreate), CARE, and PLAY.

SEEKING: Dr. Panksepp says SEEKING is “the most basic impulse to search, investigate, and make sense of the environment”. SEEKING, as Dr. Panksepp describes it is actually a combination of emotions we usually think of as being different: wanting something good, looking forward to getting something good, and curiosity. The wanting part of SEEKING gives you the energy you need to go after your goals, which can be anything from food, shelter, knowledge, acquisition or sex. Temple Grandin describes the “looking forward to part of SEEKING as the Christmas emotion.” Curiosity is related to novelty and we see this orienting response...
in animals and humans when they hear a noise, turn their head and pause. During the pause, the animal or person decides. Do I keep SEEKING, run away in fear, or attack? SEEKING is always about something you do not have yet. It is a pleasurable emotion and if an electrode is planted in an animal’s brain, it will pull the lever to turn the current on. Researchers originally thought that this was such a strong system that they called it “the brain’s pleasure center”. Panksepp has found that it is actually the pleasure people or animals feel when they are looking forward to something good. He sees SEEKING as a kind of Master Emotion which could be a “generalized platform for the expression of many of the basic emotional processes….It is the one system that helps animals anticipate all types of rewards.” Grandin believes that the SEEKING system may turn out to be an “all purpose emotional engine” that produces both “positive and negative” motivations to approach or avoid.

If we take the emotional systems Panksepp identifies and bridge these emotions with the Emotional Message Chart we can really see what is happening and how it is affecting our limbic system, brain and our behavior. Kohanov’s chart developed through the work at Epona Equestrian Services, like all descriptive theories, is a good basis for this next evolution describing the messages, the purpose, and the benefits that our emotions provide.

The first category lists the major emotions that are actually constructive if responded to efficiently. The “Message” is what the emotion is telling us. The “Questions to Ask of the Emotion” offer focus for processing the message behind the emotion. The “Intensification” column outlines the emotion/issues/coping mechanisms that result from suppressing or ignoring the original instructive emotion. (Emotional Message Chart, 2002)

Intensification usually means the arousal level is so high that the original intent or message is no longer available. The person or animal will dissociate to such a degree with the arousal level out of normal range that the information traveling from the limbic system to the neocortex for scanning and sorting is lost.

The following chart combines the work of Kohanov, Panksepp and my own observations and thoughts. Fear/Vulnerability and Anger/Frustration are matched together since they feel the same in the body but have very different messages.
## Emotional Systems
(Emotional Message Chart)

<table>
<thead>
<tr>
<th>Emotion</th>
<th>Message</th>
<th>Questions to Ask of the Emotion</th>
<th>Intensification</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FEAR</strong></td>
<td>Intuitive, focused awareness of something that is a threat to our physical, mental, emotional or spiritual well-being.</td>
<td>What is the threat? What action must I take to move to a position of safety?</td>
<td>Worry, Anxiety, Confusion, Panic, Terror, Dulling of Senses, Dissociation</td>
</tr>
</tbody>
</table>

The **fear** system is activated when the animals or humans survival is threatened in any way from an actual physical threat to a mental or social threat. Fear stimulates the amygdale, the brain’s fear center, and all types of fear are felt the same in the body. The work with the horses, however, has informed us of another “kind” of fear which feels the same but has a very different message.

This type of fear we call **vulnerability** and the differentiation allows us to move from the position of surviving to thriving. Fear which threatens our survival activates the fight, flight or freeze mode. **Panic** is Panksepp’ word for the social attachment system. All baby animals and humans cry when their mother’s leave and a baby left alone is likely to die or become seriously depressed. Grandin believes that the panic system evolved from physical pain because when you stimulate the part of the animal’s brain that regulates physical pain, the animal makes separation cries.
“Vulnerability is an emotion that commonly arises in equine-facilitated psychotherapy and experiential learning, and it took me a while to understand its meaning. The key lies in separating it from fear, our natural warning system. If, upon checking in with the mind-body awareness system, there is no discernable threat in the immediate environment, check to see if the threat seems to instead arise from a conflict within the self. Vulnerability marks the point at which an old coping strategy, behavior pattern, or perception of the world is being challenged—or a previously repressed part of the self is being revealed. This threatens the conditioned personality or the ‘false self’” (Kohanov)

I was recently asked to differentiate between vulnerability and risk. This gave me the opportunity to think beyond what I have previously taught that fear was an “outside” job needed for survival and that vulnerability, while feeling the same in the body initially, was an “inside” feeling. I came to the conclusion that vulnerability was the feeling before risk which was the action. If we only experience vulnerability without action we may feel weak and even experience “learned helplessness” a concept described by Hans Seligman. If we take a risk without an assessment of the possible consequences of this action we can set ourselves up for injury, danger or even death. The key is to become conscious and take action or risk, a yang movement, after we have accessed the feeling, or yin place, we are in. If we take the risk unconsciously, the likelihood of success is limited and the probability of failure is much greater. Some people may be more apt to take the risk unconsciously and others may be immobilized and remain stuck in the same behaviors and patterns, thus making vulnerability a liability and not an asset.

So we must first notice the sensation or feeling and identify the emotion; second engage in self-regulating our arousal system so that we can be present and cognitively aware; third engage in what Panksepp identifies as one of the “blue ribbon” emotions, SEEKING which involves curiosity and inquiry; and finally take thoughtful conscious action (risk).
<table>
<thead>
<tr>
<th>Emotion</th>
<th>Message</th>
<th>Questions to Ask of the Emotion</th>
<th>Intensification</th>
</tr>
</thead>
</table>
| ANGER   | Proper boundaries should be maintained or rebuilt. | What must be protected?  
What must be restored?  
What is the emotion behind the Mask and is it directed at me? | Rage  
Fury  
Apathy  
Incongruence  
Fear  
Anger  
Confusion |

Panksepp calls **rage** the core emotion which evolved from the experience of being captured and held immobile by a predator. Rage gives the captured animal the explosive energy it needs to struggle violently and maybe shock the predator into loosening the grip long enough for the animal to flee. When our boundaries are violated or we feel incongruence we may experience anger. Without proper boundaries, and with the confusion that incongruence generates, anger can develop into rage. In humans we often see rage justified as anger and often the rage is not dependent on actual circumstances but on an inability to personally manage an individual’s arousal mechanism. In other words, a person who is not conscious of their arousal level can easily be “triggered” from anger into a full blown rage or fury.
<table>
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<tr>
<th><strong>FRUSTRATION</strong></th>
<th><strong>Message</strong></th>
<th><strong>Questions to Ask of the Emotion</strong></th>
<th><strong>Intensification</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The action that is being taken is not effective.</td>
<td>Where is the block? What can I do differently? Who can I ask for ideas and/or assistance?</td>
<td>Rage</td>
</tr>
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</table>

**Frustration and anger** need to be differentiated since they feel the same in the body but have very different messages. Frustration arises when the action you’re taking is not effective; and you are not able to get help; or are unwilling to ask for help or see the situation in a different way. Both anger and frustration can develop into full blown rage and I have seen frustration go into rage very quickly when the individual is unconscious of their arousal level. A baby for instance will become furiously angry when they are not being “heard” or when their needs are not met. Without language their only way of communicating is with signals which need to be paid attention to for their very survival. Grandin feels that “frustration from mental restraint evolved out of RAGE from physical restraint”. I have seen a lot of confusion, fear and misunderstanding from people when they are not told how the differences between anger and frustration affect them, and how to ask the questions to get to message of the emotion. You can also see how the person or animal would PANIC thinking their very survival is threatened. The arousal level would rise and the flight, fight or freeze mode would be activated. This would happen without conscious awareness since the message generated by the limbic system would not have the time to travel to neocortex for scanning and sorting.
<table>
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<th>Emotion</th>
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<th>Questions to Ask of the Emotion</th>
<th>Intensification</th>
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</thead>
</table>
| ANXIETY  | The person with whom you are interacting is incongruent. | What is the emotion behind the mask?  
Is it directed toward me? | Rage  
Mistrust |
| AGITATION| Often mistaken for anger                      |                                 |                 |
| SADNESS  | Restores flow to psyche when loss is imminent. | What must be released?  
What must be rejuvenated? | Despair  
Despondence |

McLaren emphasizes we must ask both questions to complete the cycle. **Sadness** “brings the healing waters of tears and physical release to us” and “removes log jams in our psyches” so that we can live authentically again. If we can’t let go of old patterns and destructive relationships, we can’t be rejuvenated, and the sadness persists. Sadness is often a part of grief or depression, but in its purest form, it is a healing agent that motivates us to let go of what no longer serves us so that we can be rejuvenated for a new stage of growth, development and creativity. “If we wallow in sadness and self-pity and refuse to let go, our sadness will have to intensify into despair and despondence.”

We will also experience tears which may feel like sadness but actually have a very different message. Have you ever had tears well up when meeting a part of yourself you thought you lost? Have you cried some tears when...
you were touched at a wedding or viewed a touching movie or heard a story which “pulled” on your heart strings? These tears, although sometimes confused as sadness, are actually “tears of recognition and remembering” either for your sacred self or for the sacredness of all of humanity and Earth herself.

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<tbody>
<tr>
<td>GRIEF</td>
<td>No choice about releasing something. Loss or death has already occurred.</td>
<td>What must be mourned?</td>
<td>Depression</td>
</tr>
</tbody>
</table>

According to McLaren, “grief doesn’t just bring waters of release to our psyches as sadness does; it drops us directly into the deepest rivers of the soul”. If we can grieve our losses, whether they occur from death; loss of a job; loss of a relationship; or from a way of living or being, we may be able to regain our sense of self and life purpose. Without fully grieving our losses, our life can become stagnant, boring and without interest or drive.

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</thead>
<tbody>
<tr>
<td>DEPRESSION</td>
<td>“Ingenious Stagnation”</td>
<td>What has my energy gone?</td>
<td>Loss of Self</td>
</tr>
<tr>
<td></td>
<td>“Stop sign of the Soul”</td>
<td>What new direction gives me energy?</td>
<td>Loss of life’s purpose</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Suicidal Urges</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Physical Illness</td>
</tr>
</tbody>
</table>

**Depression** most of the time follows a period when we didn’t listen to sadness, fear, anger or grief. McLaren emphasizes that depression is not a sign of stupidity; it is, in fact, “a most ingenious survival mechanism where the psyche is given no choice but to hinder our ability to move forward because it knows we shouldn’t move in the direction we’re headed. In a world where we’re taught to ignore our emotions, dreams and true passions, where we enter blindly into the wrong relationships and the wrong jobs, depression is our emergency break.” Depression takes over when “what we were doing and where we were going didn’t match up with our inner desires.”

Depression can occur, however, because of a chemical imbalance, inherited predisposition, or because of extreme outside circumstances. I have found with what I call the “HMO model” of treatment for depression that medication alone is not as effective as is assisting the person on how to use some of these questions to help them make better choices in the future. I think that the appropriate medication or homeopathic remedy can bring
up “the baseline” for the person’s to be able ask the questions, find the message before it goes into intensification, and therefore have the opportunity to see the future in a different light.

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<tbody>
<tr>
<td>SUICIDAL URGE</td>
<td>The life being lived is endangering body and Soul at such an extreme level that it will cause permanent damage.</td>
<td>What must end now?</td>
<td>Soul death</td>
</tr>
<tr>
<td></td>
<td></td>
<td>What must be killed?</td>
<td>Physical death</td>
</tr>
</tbody>
</table>

Sometimes the suicidal urge results from depression related to chemical imbalance and/or chronic pain. In these cases, both medical and psychological/spiritual support is needed, or the person may successfully commit suicide in a moment of extreme fatigue to simply end the pain.

Yet McLaren emphasizes that the suicidal urge absolutely does not want an end to physical existence; rather it emerges when the difference between who we are in our deepest, most authentic selves and who we’ve become to fit into a materialistic social system are completely out of alignment. The suicidal urge often “emerges when our lives are already endangering our souls….What needs to die is our attachment to falseness, lovelessness, lies and spiritual emptiness,” basically whatever stops us from living authentically. The dark night of soul experienced in this state “exists in direct proportion to the dawn that awaits” us.

While McLaren’s comments emphasize the imminent death of the soul---the person is about to become an automaton if she doesn’t take action--- research implies the development of serious physical disease over time. The levels of stress/abuse/emotional repression leading to this extreme state of distress have been shown to suppress the immune system beyond its capacity to fight off disease. Candace Pert, “Molecules of Emotion” and Bruce Lipton, “The Biology of Belief” are two very good sources which identify the extent that stress and unexpressed emotions and desires can have on an individual’s life force.

People experiencing a suicidal urge must be taken seriously and appropriate clinical support is absolutely required. The questions, then, are the most extreme for this reason. As McLaren so eloquently conveys:

“If you ask these questions prayerfully and ceremonially, your suicidal urge will tell you this draining behavior, this soul-killing relationship, this painful addiction, this weakness and self-pity, this pathetic story about why you can’t do your art (shows that) you’ve forgotten who you are, but I remember. If you let it speak, your suicidal urge will stand up for your lost dreams, and it will help you clear away everything that threatens to kill them. It will remind you of your forgotten goals, and it will help you move toward them again….You’ll be given your own life back.”

Hopefully, once we begin to honor these emotions and listen to their messages we can engage in some of the more “positive” emotions such as Seeking, Care, Play and Sexual Desire. All of these emotions while clouded with the unexpressed or unacknowledged so called “negative” emotions are not free to be experienced in their purest most life enhancing way.
In conclusion the “Blue-ribbon emotions” described by Panksepp, the viable work of Temple Grandin and the many experiences I have personally witnessed with the horses and humans gives me hope. As a species we can not only learn from our partners, the horses, but we might imagine a life for every creature on this Planet which allows all of nature to be replenished, thrive and have the probability of living as one ecosystem honoring all. The Sacred Place of Possibility becomes this place of probability and promise. Can you imagine that?

Sources:
“Animals Make Us Human” Temple Grandin and Catherine Johnson, 2009 www.hmnbooks.com
“Emotional Message Chart” Linda Kohanov (Epona Equestrian Services, 2001)
“Emotional Genius” Karla McLaren (Laughing Tree Press, 2001)
Conversations, Consultations and Inquiry with Leigh Shambo and David Yong, www.humanequinealliance.org; Wren Breedlove, ravenspeakstome@yahoo.com Blue Ribbon
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</tr>
</thead>
<tbody>
<tr>
<td>Fear</td>
<td>Intuitive, focused awareness of a threat to your well being</td>
<td>What is the threat? What action must I take to move to a position of safety?</td>
<td>Worry, anxiety Confusion Dulling of the senses Panic, terror, dissociation</td>
</tr>
<tr>
<td>Vulnerability</td>
<td>Something significant is about to change or be revealed;</td>
<td>What belief, behavior or perception is being challenged? How might my life change if I accept this new insight?</td>
<td>Panic Rage</td>
</tr>
<tr>
<td>Anger</td>
<td>A physical or emotional boundary has been crossed</td>
<td>What must be protected? What boundary must be established or restored?</td>
<td>Rage, fury (sometimes this involves exploding at an innocent bystander) Deflected Rage (exploding at an innocent bystander) Boredom, apathy (masks anger that can’t be dealt with; a non-violent coping strategy)</td>
</tr>
<tr>
<td>Agitation/Anxiety (often mistaken for Anger)</td>
<td>The person interacting with you is incongruent (This is not chronic, long-term anxiety but anxiety experienced in the presence of a specific person.)</td>
<td>What is the true emotion behind the other person’s mask of control, friendliness or well-being, and is it directed toward me?</td>
<td>Rage Mistrust</td>
</tr>
<tr>
<td>Frustration</td>
<td>The action you’re taking is not effective</td>
<td>Where is the block? What can I do differently? Who can I ask for ideas and/or assistance?</td>
<td>Rage Powerlessness</td>
</tr>
<tr>
<td>Envy</td>
<td>The person you envy models a talent, success, position, or lifestyle you want to develop or acquire</td>
<td>What aspects of this person’s life, career, personal qualities, relationships, or talents inspire me to excel? What professional training or skills must I develop to achieve similar success? Who can I enlist for support in this next state of growth?</td>
<td>Hero worship Rivalry Resentment</td>
</tr>
<tr>
<td>Jealousy</td>
<td>An inequity in resources, pay, recognition, opportunity, or relationship has come to your attention</td>
<td>Exactly who or what am I jealous of? Is this an unintentional oversight? If so, who can rectify the situation? If not, how can I strategize and gather support to change an unfair system?</td>
<td>Resentment Outrage</td>
</tr>
<tr>
<td>Disappointment</td>
<td>The outcome (contrary to what you desired or envisioned) did not live up to your expectations</td>
<td>What was I hoping/expecting to happen? Was this realistic? If so, how can I better communicate my vision to those capable of carrying it out? If not, how can I modify my vision &amp; better train, prepare, and support the people involved?</td>
<td>Anger, Frustration Mistrust Powerlessness Apathy</td>
</tr>
<tr>
<td>Guilt</td>
<td>Critique of a destructive, neglectful, or abusive behavior. (This can be an internal critique or a transgression that others are bringing to your attention)</td>
<td>What questionable behavior or action did I engage in? What was my motivation? How can I get my needs met in a more productive way? Who can help me change this harmful habit?</td>
<td>Denial</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Shame</td>
<td>A possible indication that you are being scapegoated. Or a personal critique of a “defective” state of consciousness or being.</td>
<td>Am I being shamed by others? If so, am I being objectified or used as a scapegoat? How can I set boundaries with these people---without shaming them? Or am I feeling shame for an old way of being or perceiving the world? If so, what destructive behaviors must I change to fully enter this new, more conscious, compassionate, and responsible phase of life?</td>
<td>Despair</td>
</tr>
<tr>
<td>Sadness</td>
<td>Loss is immanent and in your best interest</td>
<td>What must be released? What must be rejuvenated?</td>
<td>Despair</td>
</tr>
<tr>
<td>Grief</td>
<td>A significant loss or death has occurred, usually due to circumstances beyond your control.</td>
<td>What must be mourned? What must be memorialized, appreciated and/or celebrated?</td>
<td>Depression</td>
</tr>
<tr>
<td>Depression</td>
<td>“Ingenious Stagnation” “Stop sign of the soul”</td>
<td>What activities or relationships drain my energy most? What new direction gives me energy?</td>
<td>Loss of self</td>
</tr>
<tr>
<td>Suicidal Urge</td>
<td>Some aspect of the life you’re leading must end (not your physical existence) must end.</td>
<td>What must end now? What must be culled?</td>
<td>Becoming like a “soulless automaton”</td>
</tr>
</tbody>
</table>

Copyright 2012 by Linda Kohanov, from her upcoming book *The Power of the Herd* (New World Library, 2013). An earlier version of the EMC grid, abbreviated from Kohanov’s Emotional Message Chart first presented in *Riding between the Worlds*, was developed by Eponaquest instructor, Nancy Waite-Obrien, Ph.D. The emotions fear, anger, sadness, grief, depression, and suicidal urge, as well as the EMC format (message, questions to ask, and intensification) were inspired by Karla McLaren’s audio book *Becoming an Empath* (Sounds True, 2005), though the messages and questions have since been updated through extensive research and experience using the chart with Eponaquest clients. The messages, questions, and intensifications of vulnerability, agitation/anxiety, frustration, envy, jealousy, disappointment, guilt, and shame were developed by Linda Kohanov.
Beyond the False Self
Seeing with the Heart

Most of us are familiar with the concept of the “False Self/Authentic Self”. We readily identify our false-self voices which live in the mind. However, what would it be like to live in the Undivided Self, to use the power of the undivided self to create, to live and to participate fully in life? What would it be like to view all people and experiences as new opportunities to see with the heart and the mind?

The false self is so prevalent that you don’t see it, just as a fish doesn’t see the water. The constant inner talk we hear all of the time is a form of suffering; however, the book “The Untethered Soul” by Michael Singer has a lot to say about this limiting view of our self.

“Right in the midst of your daily life, by untethering yourself from the bondage of your psyche (your mind), you actually have the ability to steal freedom for your soul. This freedom is so great it has been given a special name-----liberation.” (p. 98)

“Your views, your opinions, your preferences, your goals, and your beliefs are all ways of bringing the infinite universe down to the finite where you can feel a sense of control. Since the analytical mind cannot handle the infinite, you created an alternate reality of finite thoughts that can remain fixed within your mind. You have taken the whole, broken it into pieces, and selected a handful of these pieces to be put together in a certain way within your mind. This mental model has become your reality. You must now struggle day and night to make the world fit your model, and you label everything that doesn’t fit as wrong, bad, or unfair.” (p 120)

When we can live in the undivided mind we utilize the skills and personalities of both sides of the brain. Each side supports, influences, and tempers the other. We live our lives more fully and are capable of present moment awareness and recognition of the past and future as it relates to our present experience. When we live primarily in our left brain we can exhibit rigid patterns of thinking, analyzing and ways of behaving. In contrast if we live primarily in the right brain we can be continually living “with our head in the clouds” or even becoming “spiritual by passers” (Welwood, John “Toward a Psychology of Awakening”)

When we can create a balance between the two hemispheres of the brain, we can remain cognitively flexible enough to welcome change (right brain) and yet remain concrete enough to stay on the path (left brain). Allowing ourselves to have a plan of action and to live in “horse time” takes a bit of practice and enriches our life with opportunities for creativity and flexibility. If we can have a plan, outline, or intention, and be open to outside influences or circumstances which require change, we can literally have the best of both worlds. If we can become aware when our brain is more divided, we can also look for ways to create balance and ease.

When speaking to groups or individuals, I often challenge them to look at the ways they have previously viewed the world and to see where their “false self” voices have kept them safe, and encourage them to take the risk of something new. To go beyond the familiar model of reality we have to take the risk of not believing it. This is where vulnerability and risk come in together. We have survived because of the beliefs shared with others, and to go beyond these beliefs takes courage. When we start to feel uncomfortable, the mind will find ways to get itself back to homeostasis since it does not like being out of control, it must know what is going on.

Seeing with the heart, however, allows us to be in present moment awareness and to live from our authentic self. Your heart is an instrument made of extremely subtle energy. When you “feel” music, see the beauty of a flower, or bird song, you can hear it and see it, but the feeling comes through the filter of the heart. The heart controls the energy flow of opening and closing to others. The heart closes when stored energy, feelings, or unfinished business block the opening of the heart.

“Two kinds of experiences can occur that block the heart. You are either trying to push energies away because they bother you, or you are trying to keep energies close because you like them. In both cases, you are not letting them pass, and you are wasting precious energy by blocking the flow by resisting or clinging.” (p.56)
It’s about letting go of the pull that the energy of the thought, emotion or experience has on you. Consciousness experiences the “creation” of thoughts and emotions, and it has the clarity to see where it comes from. “Letting go means falling behind the energy instead of going into it. It just takes a moment of conscious effort to decide that you’re not going there. You just let go. It’s simply a matter of taking the risk that you are better off letting go than going with the energy. When you’re free from the hold the energy has on you, you will be free to experience the joy and expansiveness that exists within you.” (p.65) In other words, you are able to live authentically.

If, however, you are still guided by “false self” voices and your energy is blocked with unprocessed or unexpressed emotions, the inner noise begins, the “gerbil wheel” gets activated and we are off and running in the past and not the present. If we do not allow these energy patterns to pass through, they become stuck and can prevent you from having the full experience of the Now. Likewise if you build up sufficient energy in the heart, no new information or experiences will be filtered through and then the heart becomes dark and depressed.

When the heart becomes blocked and your feelings, actions and motivation are guided by the survival instinct, you can only react by defending yourself. Your survival instincts kick in and you want to fix it, destroy it, or run away from it.

If this energy block is long standing and runs very deep in your psyche, the disturbance caused by this block will alter the clarity with which you view all new information. When you actually tell someone how you feel about them or a particular situation from this state of non-clarity, you have involved the other person’s heart and mind in your stuff. Both of your egos are now involved and you will both want to justify and defend your position and you will not be able to see the other person’s “side”. First you fall into the darkness or trap, and then you manifest this on the outside. You dump your stuff into the world and you put more of this kind of energy into the environment and it comes back to you. You are then surrounded by people who act just like you!

Once you let go, the blocked energy can be released. “Getting involved in the darkness does not dispel darkness; it feeds it” (p.78). You will fall down again, we all do, and just let it go and use this as a lesson. If you can learn to let go once you have fallen, you will find that you have this energy to go up not down.

We are often asked, “How exactly do you define spirituality?” I find this definition once of the best I have seen since it describes a process and a journey. “Spirituality begins when you decide that you’ll never stop trying. Spirituality is the commitment to go beyond, no matter what it takes. It’s an infinite journey based upon going beyond yourself every minute of the day for the rest of your life. If you’re truly going beyond you are always at your limits. You’re never back in the comfort zone. A spiritual being feels as though they are always against the edge, and they are constantly being pushed through it.” (p. 124)

In contrast, the result of clinging to what feels safe is that selective thoughts and emotions stay in place long enough to become the building blocks of the psyche. With thoughts you have created a structure of solidity which you define as yourself. Your soul and your heart are really the true essence of who you really are.

The essence of spirituality is letting go of this false sense of self, this façade, and this need to have others behave predictably. It is being in the vulnerable, unknowing part of you. You decide to take the journey by constantly letting go, not clinging, and being a witness to your thoughts, your feelings, and your state of mind. Living authentically from this soulful place is the way to true freedom.

_Kathleen Barry Ingram_  
_August, 2009_
JOHARI WINDOW
(named for Joe Luft and Harry Ingram)

KNOWN TO SELF

Known to others

PUBLIC
1

UNKNOWN TO SELF

Known to others

BLIND
2

Unknown to Others

SECRET
3

UNCONSCIOUS
4

Kathleen Barry Ingram, 2004
Using the Johari Window

The goal for the client is to enlarge the quadrant that is public and to shrink the other 3 cells. This allows individuals to see their blind spots, make the unconscious conscious and to stop keeping secrets.

**Cell 2, the Blind Self,** is the cell we use in coaching; particularly in group coaching. The client learns how the client is perceived by others through feedback from the group members and the horse’s reactions and responses. The horses shine the light on these behaviors and patterns without judgment. Through this process, an individual is able to see how the behaviors and patterns of the past are affecting their communication and relationships.

**Cell 3, the Secret Self,** is “what I know but I don’t want others to know or to see”. Naturally, the goal in coaching is to decrease the secrets and to allow for full disclosure. The shame that often accompanies secrets is crippling and keeps the individual from reaching their full potential. It is important for us as coaches to keep the container safe and to be aware of the need to uncover gently and slowly the secrets that have been so safely tucked away. The horses, however, do not always know this!

**Cell 4, The Unconscious,** is the wonderful area where the horses really partner with the client and the coach. The horses are experts at picking up the unconscious and unknown cues and feelings of clients and coaches. By making the unconscious conscious, the horses allow us to access to the client’s underlying anxieties and issues …and can provide the opportunity for healing to occur at a deeper level. It is important to note that this can also lead to too much too soon. Sometimes the revealing of secrets and unconscious memories are shown before the client is ready and feeling safe. This is why it is important for the coach to be fully engaged and present, and in a group setting, why it is important to have the safety persons ready to provide the container of safety when an individual needs one on one assistance. When this happens, the coach will need to know how to safely direct the session and allow for a secure and contained place to process the feelings and memories as they emerge. Often, an individual needs the time to process individually before they are ready to expose themselves to the group. A client may go into regression by acting out defensively, retreating (either physically leaving or dissociating) and/or by shutting down completely. As a coach, you need to be clear, conscious and available to help the client continue processing once they are back to present reality. Remember that their defenses and the “fight, flight or freeze” mode have served them in the past and kept them protected and safe. Pulling the blanket of safety off too quickly can result in more damage and re-injury. Experiential work, like the equine assisted coaching in which we are engaged, can be very powerful and healing.

It is our responsibility to be able to identify where an individual can be tested in the group setting. This will all depend on the ego strength of the client. A client’s ego strength is their ability to effectively mediate between the internal pressures and feelings, which emerge, and the external realities present in the moment. If a client has poor ego strength, they will react to the stress induced by a highly charged emotional experience with defensiveness and regressive behaviors. You will see cognitive and emotional confusion and an increased rigidity of thought and affect. An individual may be able to be fully functional in many areas of life and have an area where they are most vulnerable to disclosure. Repetition of simple tasks can help the individual to create new neural pathways with positive outcomes and heal some of the cracks in their individual ego strength. This is why simple tasks like grooming and haltering a horse can either be healing, boring or anxiety provoking. Each individual will respond differently based on his or her earlier experiences, successes and failures.

**Cell 1, the Public Self,** is the area, which will expand with repeated positive reinforcement and successes. One of the gifts of equine assisted coaching is to be able to see healing taking place in the present moment. An individual can feel the shift in their body and can begin creating the new neural pathways right in front of our eyes. Their old, worn superhighways to emotional triggers in the past can be replaced with new and open systems. The tiny path created by one positive equine interaction can help build the super highway of their future.

*Adapted from Kathleen Barry Ingram, MA for Equine Alchemy
Equine Assisted Coach Training April/2011*
Steps to Setting Up a Successful Coaching Relationship

1. Initial contact
   a. Assessment—Begin informally (MLSC Ops Principle #3 #9)
   b. Powerful questions
      i. What is the explicit request vs. the hidden request?
      ii. Are you a match?
      iii. What are their expectations?

2. Setting up the agreement or contracting
   a. Alignment and engagement—what are their and your expectations? (You can never ask this enough!)
   b. Formal agreements and contracts
   c. Formal assessments

3. Initial Meeting—Should be at least 2 hours
   a. Outline what the session will look like
   b. Review Coaching Relationship expectations and goals
      i. Be aware of your expectations and how explicit you are (MLSC Principles #4, #5, #9)
   c. Review agreements and contracts
   d. Introduce common tools, i.e. CPR and/or ways of working within the coaching sessions and in between sessions
   e. Review Coaching Session expectations and goals
      i. Always be aware of explicit vs. hidden expectations or goals and discern when the time to bring this information out is.
   f. After setting this up, outline what the remainder of the time in the session will look like
   g. End with a request for what they learned and inviting commitment to action/homework (MLSC Ops Principle #1)
   h. Connect those actions to their goals
   i. Review session objectives and if those were met
   j. Confirm/set up next session; confirm what they should expect in between sessions, i.e. Coaching Reflections, CPR for next time, if it is a group call times, etc.
   k. Ask if this is what they expected and could anything be different for them to perceive more value from the relationship.

4. In Between Sessions
   a. Send out any tools/materials you have agreed upon—reiterate any instructions and agreements around these you have made the first time.
   b. Confirm next meeting 24 hours in advance.

5. Consequent Sessions
   a. Begin each session by reviewing expectations and goals for the session—you can revisit overall coaching relationship goals as well. You need to discern if this is at each meeting or not.
   b. Repeat above steps E though K.
   c. Be aware if these need to change and make the changes
   d. As part of the coaching relationship and potential, maintain transparency around agreements and commitments that are not fulfilled.

6. Last Session
   a. Send out an evaluation in advance of the meeting so you can discuss
      i. Evaluation should include initial goals and expectations
      ii. How was their experience
      iii. Feedback for the coach
   b. Ask if they want to continue another ‘group’ of sessions then or in the future (Always re-contract for anything new)
   c. Ask if they are willing to give you a recommendation/quote
   d. Ask if they are willing to give you anyone’s name that you can contact that could use your services.
   e. Leave the door open however feels best for you
Module 5
Multi-Level System Coaching

Multi-Level System Coaching
ICF Core Competency Levels and Client Log
Module 5 Overview

Pre-Reading Assignment
- Multi-Level Systemic Coaching (MLSC) (electronic handout)
- Introduction to the ICF Core Competency Levels, Login instructions and Coaching Log template (electronic handouts)
- Review: Core-Competencies, #2 and #3
  - Co-Creating the Relationship - focus on presence
  - Communicating Effectively through Active Listening, Powerful Questions and Direct communication

Multi-Level Systemic Coaching
- Coaching
- Systems Development
- Emotional and Energetic Agility
- Key Elements of Growth and Change
- 10 Operating Principles
- Systems Entry

ICF Core Competency Levels
- Table of ICF Core Competency Levels
- Instructions for Client Log
- Client Log Template

Coaching Demo Call #5
- Short Review MLSC Model
- Introduce Key Elements of Growth and Change (handout)
- Alain Cardon’s Toolbox III – Agreements (handout)
- Demo of how Multi-Level Systemic Coaching encompasses the whole model (integration of the Co-Active Coaching Model and Core Competencies)
- Student Coaching Exercise with application of MLSC Model
Multi Level Systemic Coaching

developed by Lisa Murrell

Multi Level Systemic Coaching

What does it do?
- Engages entire system as part of the solution
- Combines the methodologies of:
  - Coaching
  - Systems Development
  - Intersubjectivity—the sharing of subjective states by two or more sentient beings

Key Methodologies

Experiential Learning is great for all of these!!

Multi Level Systemic Coaching

- Current Situation
- Ideal Situation
- Exploration
- Road Block
- Shifts
- Actions/Results
Multi Level Systemic Coaching

- Holistic Approach
- Patterns
- Alignment
- Systems
- Culture
- Structure
- Processes

Key Elements of Growth and Change in Multi Level Systemic Coaching

Strategize → Explore → Action/Results → Align → Assess → Engage

Client Request

Guidelines to Multi-level Systemic Coaching

- Coaching begins the moment of contact
- Meet the client where they are
- “The end is in the beginning”
- Self-Management
  - “Just because you can doesn’t mean you should”
  - It is the client’s experience
  - You are always impacting the session
  - Notice if you ‘see what they should see’ and let it go
- Each coaching session contains the following
  - Assess/align/engage/explore/strategize
  - Integration of:
    - Biggest impact
    - Path of least resistance
    - Short term/long term impact
- Everything you see is a potential microcosm of client and your behavior patterns
- The client is a mirror of you
Key elements of Growth and Change in Multi-Level Systemic Coaching

Assessment
This is the Body Scan of the person, group or organization. Observe with your eyes and intuition; subjective experience and witnessable data. (Remember, the assessment and coaching begins from the initial contact.)

- What is happening?
- What is not happening?
- What is missing?
- What is the formal request?
- What is the hidden request?

In an organization or group:
- What is the culture, structure and processes?

Look for:
- Pattern of behaviors and group dynamics
- Illusions held by the group or the individual
- Individual and group assumptions that drive behavior
- Self-deceptions
- Where do they lead, where do they follow?
- How do they listen?

Ways to assess:
- Individual interviews either verbally or on paper—It has been my experience that specific questions on paper completed in advance of a dialogue lead to the best results. A verbal interview by itself presents a stronger opportunity to ‘get lost in the story’.
- Go and visit their environment—This is an opportunity to see them ‘in action’. It will also give you insight into their current system and its dynamics. You can then use this information as a basis for their frame of reference in most of your conversations.
- Sit in on one of their meetings—In a corporate or business environment, there is no better place to see what the ‘real’ story is than a typical business meeting. Everything you need to know about everything is revealed in this setting. It is also the perfect place to begin to make concrete systemic changes. (See my product on The Meeting Process)
- Various behavioral diagnostics—DiSC, Insight, MCG Leadership Questionnaire, Meyers/Briggs are to name a few. This will not only give you information on the person/group, it brings some of the behaviors out in the open in a more objective manner enabling you both to look at behaviors from a different perspective.
- Ask them to draw their situation or organization.
- Ask for a chart of their organization.
- Observe them doing what they do.
Engage/Align
After the body scan, it is now time to turn around and look toward the client to see what they have to say. It is time to invite them into the process with clear contracts, agreements and expectations.

You can do this by:
- Using Systemic contracting—See Alain Cardon’s Toolbox III
  - The overall coaching contract, which includes expectations.
  - Session Agreements
  - Sequence Agreements
  - Homework agreements or contracts
  - Confrontation agreements
  - Coach intervention agreements

Exploration
Now that you have done your body scan and engaged the clients, together notice the above primary sensations from the assessment. Exploration is breathing into those sensations and finding the information in them.

This can include:
- Separating root causes (their frames of reference) from the symptoms (problematic behaviors)
- What are the apparent flow/blocks in energy?
- What is the core essence of the person/organization?
- What is underneath that is waiting to happen?
- Does the client see the big picture?
- How can you both select the points of entry into his/her situation?

Strategize
Strategies for action happen after powerful coaching conversations.

Powerful coaching conversations can involve:
- New Possibilities for the future
- Acting as a mirror for the client to gain new perspective
- Being a thinking partner—Einstein’s “The same level of thinking that got you into the problem won’t be sufficient to get you out of it.”
- Reframing—how else can the situation look?
- Teaching and advising—A teachable point of view that can create greater clarity or power for the client—Is candid, practical, wise and well-timed.
- Revisiting progress/challenges and identifying new points of entry for the future either for the individual or for the organization.
Multi-Level Systemic Coaching: 10 Operating Principles

Assisting organizations to change, grow and develop over the past 25 years has given MetaSystem Consulting Group the opportunity to identify certain consistent patterns in their operating systems. In keeping with our partnership approach to consulting, we have taken these common operating patterns of our clients and developed much of our methodology around them.

   **What is the smallest thing you can do that will effect a measurable change?**
   It has been our experience that most individual and organization change efforts focus on trying to change a lot of things at once and require little, if any, individual accountability. This tends to be overwhelming and often ends up in very little happening at all. Also, we have seen that without individual accountability, change is impossible. Therefore, our approach to change is to outline a strategy that focuses on aligned individual actions with measurable impact. We begin with small, achievable actions and gradually build on those successes to create larger change. We have seen time and again that this is how real change begins and evolves.

2. Don't take it personally.
   **Everything you see is 'just' information.**
   There is a big difference between 'operational' and 'emotional' issues in the workplace and personally. We have found that many individual and organizational challenges begin with this lack of differentiation. Once people see that what is happening in their environment, either positively or negatively, is information about what they are doing and how they are doing it rather than a judgment on them personally, they have a place to go forward. The focus then becomes the operation of the organization or personal goals and important issues rather than personal dynamics. It can be a long road, but it leads to concrete, sustainable results.

3. See the universe in a grain of sand.
   **Everything you see is a microcosm of the larger system.**
   Our approach is based upon the premise that systems replicate themselves. For example, if the organization operates in a specific way, either positively or negatively impacting results, then any part of that organization will operate the same way. If you look at the Marketing Team, for example, you should have a small picture of how the organization operates as a whole. At any one time you have information about the whole organization, or system, by looking at and addressing any one part. This applies equally to individuals and relationships of any kind.

4. Start at the beginning
   **Relationships, internal/external or leadership/management; begin at the moment of contact.**
   In an effort to expose the real causes of problems or reveal opportunities for organizations to evolve, we explore different layers. We have discovered time and again that if we dig deep enough, potential for both problems and opportunities were present at the very 'beginning'. Awareness of this alleviates a lot of expensive time spent on trying to fix recurring symptoms of a problem. Once you get down to the real causes, then these issues can be addressed and maintained. A band-aid will not cure a viral infection.
5. **Sensitivity to initial condition.**
The impact of the initial agreement is exponential.
This builds on #4. Whatever happens in the beginning just keeps on growing. If it is clarity and trust within a business deal, that firm foundation supports the partnership through thick and thin. If doubt and negativity accompany the launch of a new project or product, that same darkness seems to follow it throughout its usually problem fraught life. Building awareness of this condition into contracts and agreements creates firm foundations that keep business and relationships strong and on track producing amazing results.

6. **You get what you need/you create what you want.**
People/systems attract what they need to support/maintain themselves.
What is needed to sustain a system is attracted to it by the nature of the way it exists in its environment. When intention, creativity and strategy are engaged, the people/system can create what they want to manifest.

7. **The station is broadcasting whether you're tuned in or not.**
The current system is operating to produce the results you're getting, whether it is acknowledged or not by the system components (you & your colleagues/family/spouse).
Developing an awareness of how each of us as individuals, as teams, and as a culture are co-creating the existing system and its results is a powerful step in developing the changes that will create the results you want going forward. A self-aware system can develop the capacities to become self-regulating, self-adapting, and empowered at all levels. An organization or individual can choose to read the writing on the wall or not.

8. **Everything affects everything.**
Individuals, organizations or teams never exist/act in a vacuum.
Every "component" in a system has significant interdependent relationships within its system and with other systems. The nature of MLSC helps people to become aware of these interdependencies, take them into account as they act, and leverage them to get effective results.

9. **Mirror, Mirror on the wall.**
Everything is a mirror of itself.
All the components of a system are creating information continually and feeding it back through the system. This generates a sort-of house of mirrors in which you can see your own reflection and those of your co-creators. It is a useful competency to learn how to read the likenesses and see what part you are playing; this can be the first step in developing single quanta actions to change the interplay.

10. **The apple doesn't fall far from the tree.**
Everything is a manifestation of the primary operating system.
The effects that are produced in your organization or life are produced by the system in which it operates. To get different effects/results that system will have to be modified. Not only does the apple not fall far from the tree, but also if you want orange juice, you'll need a different tree.
Multi-Level Systemic Coaching: Systems Entry
Co-Creating the Relationship

Initial assessment meeting of the client and suggested outcomes from assessment.
As you practice assessing a client/system in your coaching, these are the outcomes you will be looking for. (The black outcomes are a short hand form for what the coach is shooting for. The blue sentences underneath are how coach and clients can evaluate whether that outcome was met.)

“It’s great to be working together.” Coach practices good systems entry skills and creates relationship with the clients’ during the interview process. Clients may be ambivalent or resistant when they first come to coaching. Part of the coach’s job is creating a container where the clients feel comfortable enough to engage in the coaching.

- Coach meets the clients where they are and matches the emotional field before trying to shift it.
- Coach remains warm and engaged with the clients throughout the interview process, (Skills of emotional and energetic agility and authenticity)
- Coach uses the interview process to help reveal the system to itself, but does not compromise the system by opening up too much before there is a coaching contract.

“What’s going on and what do you want?” Coach uses a wide variety of assessment tools and approaches to assess the systems strengths and challenges.

- Coach uses interview questions from all of the areas of the client system.
- Coach can articulate the systems strengths and challenges within each area.
- Coach is clear on the clients’ stated goals and outcomes for the coaching (the clients’ agenda).
- Coach employs (or indicates they could employ) a variety of other assessment tools such as DiSC, Leadership Questionnaire, Balance Wheel, see Co-Active Coaching for Coaching Tool Kit.
- Coach can identify red flags suggesting the person may not be appropriate for coaching and can skillfully refer the clients to more appropriate care.

“Here is what I notice and let’s make a plan.” Coach is aware of the clients’ agenda for the coaching and co-creates the coaching plan with the clients.

- Coach skillfully weaves information and possible interventions from the assessment into the clients’ agenda to co-create the coaching plan. “I can see there are toxic patterns placing a strain on your work, goals, relationship, etc.
- Since one of your goals is to be more effective, we will be working on creating more clear and powerful communication”.
- Coach translates the client’s strengths and challenges into a set of coaching tools and interventions that will support their stated coaching goals.

“Reveal the system to itself.” Coach uses the assessment process to reveal the system to itself.

- Coach educates the clients on the system’s strengths and challenges revealed in the assessment process.
- Clients indicate a greater awareness of their relationship as a result of the coaching.
- Clients have a positive attitude to the outcome (even if referred) of the assessment
- Positively confronts the client with the fact that he/she did not take agreed-upon actions.
Instructions for ICF Client Coaching Log

This sample Client Coaching Log is the recommended form to use when submitting your client coaching experience for the purposes of obtaining an ICF credential. Using this form will make the credentialing process easier, and more efficient. As soon as you begin coaching, you should begin logging client coaching hours. Four types of clients may be included on the coaching log: individual clients, group clients, internal clients, and third-party clients.

Confidentiality

Providing Client Information

In keeping with the ICF Code of Ethics, you must obtain consent from each client to list his or her information on the client coaching log. The consent may be verbal and does not need to be provided to the ICF. Individuals who do not consent to have their names listed must be left off of the log, except in internal or third-party coaching arrangements with organizations that have a confidentiality policy. In those cases, confidential client names may be listed as aliases if you provide a reference letter from the organization.

ICF Use of Client Information

The information on your client coaching log will be seen only by ICF staff. Client information is never shared or sold to another party or used for any purpose other than review of your application. Clients listed on your client coaching log may be contacted by the ICF to verify the information in your log. If they are contacted, clients will not be asked about coaching topics.

Definitions

Client Coaching Hours

A client coaching hour is 60 minutes of actual coaching with a client who has hired the applicant as a coach and not in any other capacity. Client coaching sessions of less than 60 minutes will count as partial client coaching hours (for example, 30 minutes of client coaching will count as 0.5 client coaching hours). Coaching must be done in person or by telephone or other voice-to-voice technology.

Paid Hours

Paid hours include:

- Hours of coaching for which the coach receives payment from the client (payment may be in any amount, or barter of goods or services, including coaching in exchange for coaching)
- Internal coaching that meets the definition below
- Third-party coaching that meets the definition below

Internal Coaching

Internal coaching is coaching done as part of the applicant’s employment. In order to count as client coaching hours, internal coaching must be part of the applicant’s job description. Coaching of direct reports (employees for whom the coach is an immediate supervisor) does not count as client coaching hours.
Third-Party Coaching

Third-party coaching is coaching in which either:

- The coach receives payment from an organization specifically for coaching the client, or
- The coach volunteers to coach the client on behalf of an organization that receives payment from a client.
- Payment may be in any amount, or barter of goods or services.

Documentation

Individual Clients

For each individual client, you must log:

- The client’s name and email address
- The start and end date of the coaching relationship
- The number of paid and pro bono hours that you coached the client
- Individual clients who do not consent to have their names listed must be left off of the log. The consent may be verbal and does not need to be provided to the ICF.

Please see an example of how to log individual client coaching below.

<table>
<thead>
<tr>
<th>Client Name</th>
<th>Contact Information</th>
<th>Individual/Group</th>
<th>Number in Group</th>
<th>Start Date</th>
<th>End Date</th>
<th>Paid hours</th>
<th>Pro-bono hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joe Smith</td>
<td><a href="mailto:Joe.smith@corp.com">Joe.smith@corp.com</a></td>
<td>Individual</td>
<td></td>
<td>3/1/2012</td>
<td>3/1/2013</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Jan Doe</td>
<td><a href="mailto:Jan.doe@job.com">Jan.doe@job.com</a></td>
<td>Individual</td>
<td></td>
<td>1/1/2013</td>
<td>1/15/2013</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

Group Clients

For each group client, you must log:

- The name and email address of one individual in the group (you do not need to provide the names of other individuals in the group or the name of the group itself)
- The start and end date of the coaching relationship
- The number of paid and pro bono hours that you coached the group
- The number of individuals in the group (only groups of 15 or fewer will count)
- Each individual in a group counts as a client for the purpose of meeting the requirement of 8 total clients. Please see an example of how to log group coaching below.
Internal and Third-Party Clients

Internal and third-party clients should be logged the same as other individual or group clients unless there is an organizational confidentiality policy that prevents you from disclosing the client’s information. If there is a confidentiality policy, you must provide a reference letter from a contact person at the organization who is familiar with your work. The reference letter must include:

- The name and contact information for the contact person
- A description of the role of the contact person in the organization
- A description of your role in the organization
- Confirmation of the organization’s confidentiality policy
- Confirmation of the information that you have logged for confidential clients

For internal or third-party confidential clients, you must also log:

- An alias for each confidential client (for example, “Confidential Client 1”)
- The email address of the contact person at the organization
- The start and end date of the coaching relationship with each client
- The number of paid hours that you coached each client

Please see an example of how to log internal or third party coaching if there is no organizational confidentiality policy below.

<table>
<thead>
<tr>
<th>Client Name</th>
<th>Contact Information</th>
<th>Individual/Group</th>
<th>Number in Group</th>
<th>Start Date</th>
<th>End Date</th>
<th>Paid hours</th>
<th>Pro-bono hour</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jim Peters</td>
<td><a href="mailto:jim@abc.com">jim@abc.com</a></td>
<td>Group</td>
<td>12</td>
<td>7/1/2013</td>
<td>9/21/2013</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Pam Peters</td>
<td><a href="mailto:Pam.peters@123.com">Pam.peters@123.com</a></td>
<td>Individual</td>
<td></td>
<td>5/1/2012</td>
<td>5/1/2013</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Jim Smith</td>
<td><a href="mailto:Jim.smith@corp.com">Jim.smith@corp.com</a></td>
<td>Group</td>
<td>14</td>
<td>1/3/2012</td>
<td>2/15/2013</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>
Please see an example of how to log internal or third party coaching if there is an organizational confidentiality policy below.

<table>
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<tr>
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<th>Start Date</th>
<th>End Date</th>
<th>Paid hours</th>
<th>Pro-bono hours</th>
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<tbody>
<tr>
<td>Client A</td>
<td>Contact person – Jane Peters 123-456-7899</td>
<td>Individual</td>
<td></td>
<td>1/14/2012</td>
<td>2/26/2013</td>
<td>12</td>
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ICF Client Coaching Log

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Module 6
The Role of Vulnerability in Coaching

Daring Greatly, Facilitating Learning and Results
Getting Started Templates
Module 6 Overview

Pre-Reading Assignment
• Book: “Daring Greatly” by Brene Brown, (Chapters Three – Five, pgs. 58 – 182)
  • Review Core Competency #4 Facilitating Learning and Results

The Role of Vulnerability in Coaching
• The Window of Tolerance

Facilitating Learning and Results
• Creating Awareness
• Designing Actions
• Planning and Goal Setting
• Managing Progress and Accountability

Getting Started Templates
• Sample Personal Coaching Agreement
• Sample Getting Started Template
• Sample Personal Coaching Interview

Coaching Demo Call #6
• Coaching practice with focus on Facilitating Learning and Results
• Incorporating the tools and templates “Getting Started”.
What is Coaching?

Sample Personal Coaching Agreement

- **Fee:**
The fee per month is $__________. We agreed to have a minimum of ________ sessions. Thank you for sending a check at the beginning of each month to (insert address).

- **Period of coaching:**
We agree to work for a six month period. If at any time you or I realize that the coaching is not beneficial for you, we will stop and you will be reimbursed for any sessions paid that have not been done.

- **Procedure:**
In a phone meeting you will call me at our appointed time: (Insert your conference number skype)

- **Changes:**
If you need to reschedule your call, please give me at least 2 business days. If you fail to notify me within 2 business days, the appointment will be charged. If you have an emergency, we’ll work around it.

- **Extra Time:**
You may call or e-mail me between our calls if you need advice, have a problem or can’t wait to share a success with me. I don’t bill for extra time. I ask you to keep the extra calls from 5 to 15 minutes and that e-mails be short and direct, please.

- **Problems:**
If I ever say something that upsets you or does not feel right, please let me know. I promise to do what is necessary to have you satisfied.
If you are in agreement with the above, please sign where indicated and email this back to me before our first call. If there is something you disagree with let me know.

I look forward to this new partnership!

Client signature: ____________________________________________ Date: ________________

Coach signature: ____________________________________________ Date: ________________
Welcome!

I look forward to working with you as your coach and partner. The following material is designed to clarify how the coaching relationship works. Please read it before we meet, so we can discuss the process and work with a mutual understanding.

What is coaching?

Coaching is an intensive process of interaction over a period of time that encourages a shift in who you are (your role), what you do (your actions and way of operating) and how you do it (your skill and style). This respectful, inquiring form of conversation and listening expands your ability to make significant changes, move forward in new areas and accomplish your vision.

Coaching works when a person:

- Is willing to learn, make changes and take ownership of their situation
- Can identify a gap between where they are now and where they want to be
- Has the patience and persistence to do what it takes to make progress

As your coach you can expect me to:

- Commit to an open, honest, collaborative partnership
- Respect the confidentiality agreement we make
- Help you create a vision to work toward that has a positive impact
- Support your ownership of realistic, stretch goals
- Encourage you to take action in key areas, initiate resolving problems and learn skills to accomplish your goals
- Expand your view of what is possible and promote discovery of new insights
- Give you input, straight feedback or operate as a sounding board
- Listen carefully to what you say and ask questions to provoke awareness
- Make direct requests for you to accomplish as fieldwork between sessions
- Be a resource or share resources to use in accomplishing your goals

I expect from you as the Client Being Coached to:

- Be committed to your own goals and vision
- Experiment with new approaches and practice new behaviors
- Come to the coaching session prepared with what you want to discuss
- Lead the sessions to make sure you focus on what is important to you
- Give me feedback on whether the coaching is valuable and what you need
- Be open to hearing my feedback and let me know whether it fits
- Begin sessions with progress, discuss challenges, and end with future actions
- Agree to do fieldwork before the next session to practice skills and behaviors
- Do your fieldwork each week to bring about results or changes you desire
- Take ownership for your progress and accomplishments

My philosophy:
You have the capacity to be or do what you want in life, as well as the inner knowledge to help you make appropriate choices. I am your partner in creating your vision and supporting you to make it happen.

Coaching Process:

- Contracting: Development of a mutual understanding of the coaching process and your specific situation, creating a vision with goals and desired outcomes and setting an approximate time frame for the coaching (typically 6 months to 1 year).

- Development of Action Plan: Clarification of skills, interests, work styles and other key factors. In-depth dialogue of relevant issues and feedback on a possible direction to achieve goals. Initial action steps for each goal according to priority.

- Implementation: Regular coaching sessions focused on problem solving, skill acquisition, insightful conversation and solutions aligned with client’s vision. Ongoing sessions will be on the phone. We will arrange to meet in person when meeting with another party or a longer session seems useful.

Reflections Sheet:
To ensure the most productive use of the coaching time, come to the sessions prepared with an agenda. Take some time before our session to sort out the progress you made this week and think about how you would like to use the session. Please email me some simple thoughts on the following subjects (24 hours prior our coaching session), so I can be prepared for the session and facilitate it productively. Keep a copy of these questions and use the relevant ones in your email to me:

- What I have accomplished since our last session? (Successes during the week)
- Challenges I faced and how I handled them or will need to
- What I intended to do, but didn't (if useful-why not?)
- Insights and opportunities of which I am now aware
- I want to use the coach during this session for...
- What I promised to do
Sample Personal Coaching Interview

As your coach, it is important for me to understand how you view the world in general and yourself in particular. Each person “comes from” a unique place in their thinking and in the way they interact with those around them.

- What brings you to coaching now?
- Where do you want to see some shifts happening?
- What would be a good way to measure them?
- What will be the first small thing that might happen to indicate the coaching process is working?
- What are your goals for this year?
- What do you believe are the personal and professional benefits to your of accomplishing these goals?
- What is the most important in your life now?
- What is your vision?
- How far ahead do you go? (3 years, 10 years, etc.)
- What are your personal and professional strengths?
- What are your most significant personal and professional accomplishments?
- What’s in your way to your success?
- What kind of issues, problems or crises do you seem to attract
- What else you would like me to know?
Module 7
Coaching vs. Therapy

Glossary of Psychological Terms
Putting It All Together
Module 7 Overview

Pre-Reading Assignment
- Book: *Co-Active Coaching*, (Chapter 11 pgs. 157 – 176)
- Glossary of Psychological Terms: *How these concepts relate in EFL* (electronic handout)

Coaching vs. Therapy
- Glossary of Psychological Terms
- Karpman Trauma/Drama Triangle

Putting It All Together
- The ongoing coaching relationship
- Ways to structure contracts and agreements
- Group coaching

Coaching Demo Call #7
- Recognizing vulnerability (Read Chapter 15 from “The Way of the Horse” focus on pgs. 86 – 88)
- Continued Coaching practice
- Introduction to the “Supervision” section of the training program
GLOSSARY
OF
PSYCHOLOGICAL TERMS
How these concepts relate in EFL

TRANSCFERENCE- A state of transference exists when the client’s thoughts and feelings regarding the facilitator/horse become strongly influenced by the wishes, fears, and attitudes originally developed in past significant relationships. The client projects their unconscious internalized feelings and thoughts on to the facilitator/horse. Transference can be either positive or negative.

PROJECTION- A client experiences projection, which is similar to transference, when his or her true nature is obscured by feelings the person refuses to acknowledge in themselves and they project these feelings and beliefs onto the facilitator/horse. These feelings can be either consciously repressed or remain in the unconscious. As with transference this can be either positive or negative.

INTROJECTION- This occurs when an individual has internalized and integrated others opinions, attitudes or beliefs to such an extent that they cannot be separated from the individual’s true nature and thus affects his or her living an authentic life.

COUNTERTRANSFERENCE- The facilitator’s emotional reaction to the client developed during the treatment process is called countertransference. The facilitator may feel conflicted or disturbing feelings towards the client. It is crucial for the facilitator to explore these thoughts and feelings in order to effectively understand and treat the client.

CORRECTIVE EMOTIONAL EXPERIENCE- When the identity of the facilitator/horse is confused with past figures from childhood, we can help correct their negative thoughts and feelings about certain circumstances or memories by responding positively in the present. We can help the client to perceive her/himself differently by replacing or correcting past thoughts and feelings.

REPETITION COMPULSION- This is the tendency to act out the same unconscious scenarios with a variety of people and circumstances despite negative results.

SHORT TERM DYNAMIC PSYCHOTHERAPY- Dynamic psychotherapy deals with the unconscious forces (the dynamics) of the inner conflict by getting in touch with repressed memories and emotions and experiencing them in the present moment. By making the unconscious conscious, the client can re-examine dysfunctional attitudes and beliefs. The therapist must be able to assess whether the client has the capacity to enter into the therapeutic alliance, withstand the internal stress of the relationship, and separate from the therapist once treatment is over. An intact ego and ability to cope with painful affect are prerequisites for the emotionally intense interactions involved in treatment. Although EFL is not psychotherapy, many of the dynamics taking place in a session with the horse are similar to what a client may experience with a qualified mental health professional and therefore can be very healing and life enhancing.

EGO STRENGTH- The client’s ego strength is their ability to effectively mediate between internal pressures and external realities. In short term dynamic psychotherapy a client with poor ego strength will react to stress induced by a highly charged emotional experience with defensiveness and regressive behaviors, i.e. cognitive and emotional confusion and increased rigidity of thought and affect.
THERAPEUTIC ALLIANCE- The establishment of a good working relationship with the client allows the client to expose him or herself and be able to withstand the intrapsychic and interpersonal stresses present in the treatment process. A respectful and trusting relationship with clear boundaries must be present for the client to understand and transcend emotional reactions and irrational thinking.

ANXIETY- Primary anxiety has its roots in an early traumatic psychological experience when the person feels helpless and overwhelmed. The person reports feeling blank and is unable to use their resources in a supportive way. A panic situation may develop when a person feels abandoned and vulnerable to attack from outside influences. Secondary anxiety (signal anxiety) is present when the individual experiences uncomfortable physical sensations but maintains mental alertness and the ability to use their internal and external resources.

DEFENSES- a defense is a measure utilized by the ego to master anxiety and resolve intra-psychic and interpersonal conflict. Intra-psychic operations are used to avoid threatening thoughts and feelings. Interpersonal strategies (character patterns) are used to protect security and self-esteem. Defenses may be adaptive or maladaptive, conscious or unconscious.

RESISTANCE- Resistance blocks the therapeutic process of self-exploration and honest interactions with the therapist, facilitator, horse or other group members. Resistance is a way of defending the client against anxiety but tends to be problematic because it supports the client’s current mode of adaptation and helps maintain outdated strategies for relating to self and others.

REPRESSION- Repression is selective forgetting or blocking of feelings, which prevents the emotions from becoming conscious. Selective does not necessarily mean that the client is conscious of this but that the psyche of the individual feels this repression needs to happen for the person to survive. Thus this resistance results from the ego’s attempts to ward off threatening impulses by holding them out of awareness.

REGRESSIVE BEHAVIORS- Regressive behaviors may include: (1) high levels of cognitive and emotional confusion that threaten the client’s psychological organization and coping strategies and (2) increased rigidity and constriction of thought and affect used to protect the “status quo”.

RATIONALIZATION- Attributing one’s actions, feelings or ideas to rational motives without understanding the real and perhaps unconscious motives underlying the behavior. A person will lie or invent reasons for behavior to cover up guilt and shame.

UNCONSCIOUS DENIAL- This is a psychological defense that is used to keep unacceptable material from becoming conscious. Anything about yourself or your world that you would deem too threatening to your survival, you would deny.

RECOGNITION OR REMEMBERING- The innate intuitive capacity of human consciousness to “know” its true nature. We see or recognize from the heart a “truth”.

MIRRORING- A nonverbal interaction which allows us to bypass our rational thought process and to see the nonverbal behaviors “behind the mask”, i.e., what is, not what we want others to see.
CATHARSIS- A Freudian term which allows for the releasing of pent up feelings and emotions blocked by awareness and inhibition. Catharsis brings repressed or suppressed desires and memories into consciousness and affords them expression in the present.

CONTEXT/CONTAINER- The facilitator provides a context or a container for the client to clarify symptoms and troubled feelings, thus allowing the client a safe place in which to feel and process unresolved issues from the past.

Kathleen B Ingram, MA
Revised Material© 2/09
Karpman Trauma/Drama Triangle

VICTIM TRIANGLE

TRAUMA----VICTIM
Blame/poor me/why me/
lack of trust in self/others,
loss of safety

REACTOR---Rages/
Outburst/Attacks others
verbally/silent violence/
resentment/reactive abuse

RESCUER/CARETAKER
Codependent/Controlling
Perfectionist/Expectations
AUTHENTIC SELF CIRCLE

RESPONSIBLE TO/FOR SELF
No Blame/Able to ask for help/Lives in the present/Takes charge of own life/Safety and trust

LISTEN/RESPOND
Appropriate anger/examines all information before responding/Able to let go/Respectful of self and others

CHOICES
Appropriate boundaries/Flexible/Self Care

Adapted from Libby Timmons, M.Ed., LISAC, CEAP
Kathleen Barry Ingram '07
Appendices

What is Laser Coaching?
Group Dynamics
Sample Coaching Call Update Template
Sample MLSC Session Template
Student Notes by Donna Bunten, Equine Alchemy Certified Coach
WHAT IS LASER COACHING?

TARGET PRACTICE
Masterful coaches have to zero in on what’s important without wasting any time, but also without overwhelming the client.

WHAT IS THE PURPOSE OF LASER COACHING?
To quickly identify a greater truth and provide information that can create an immediate change. Laser coaching brings clarity and a distinct, profound change in perspective. There is a feeling of release or removing a burden. **NOTE:** Not every situation is appropriate for laser coaching in this context….laser coaching is most effective for the client who is feeling stuck or frustrated based on an existing belief or way of thinking.

WHAT EXACTLY IS A GREATER TRUTH?
It is something that is generally accepted as universally true, rather than specifically true for an individual. It is bigger than a personal belief. Almost everyone believes the same universal truths (whether they are actually true or not! In some cases, it may be a fact, but usually not statistically proven). Clients often discover they are “stuck” because they are unaware of their beliefs in these “greater truths” or hidden assumptions.

Examples:
- Filling a coaching practice can take time.
- Women talk with friends to create bonds.
- Men identify strongly with their jobs/career/work.
- Some people are content with the status quo and have no interest in changing.

WHAT ARE SOME QUESTIONS YOU MIGHT HOLD IN YOUR AWARENESS WHILE LASER COACHING?
What is the purpose of this story?
What is the emotion going on?
What does the client want the coach to hear?
What is going on with the client—as opposed to the other person/people in the story?

TRUTHS ABOUT LASER COACHING
Lasering the client’s story doesn’t mean simply summarizing and moving on to asking questions. Lasering is making sure that you, as the coach, really understand the purpose of the story and where the client is stuck.

- The coach must listen deeply; to what is said and what is not said.
- Understanding and identifying the emotion is essential.
- Ascertaining the reason for the client telling the story is critical.
- Through the process of effective duplication (or mirroring), you can already be coaching.
• Thought-provoking questions should be preceded by a request for permission. The coach MUST have client’s permission to “dive deeper” or to get closer to the truth. The more certain the client is regarding their readiness to take that risk, the easier it will be to use powerful questioning to create a shift in perspective for the client.
• It is important to check in with the client if something arises that is not in the original agreement for the current coaching conversation. Ask the client if this is something they want to talk about in this session. It may be just something the client is sharing but doesn’t want to discuss. The client may now feel complete and ready to move on and not want that discussion. In that case, no matter how vital YOU see the information to their solution, you must honor the client’s boundary and not discuss it. In time, the client will come back around to it…..when the client is ready—not when you are ready!

CAUTION/CAVEAT WHEN LASER COACHING
Coaching too early, before getting enough information, and without obtaining the client’s permission is the same as asking an inappropriate question such as “How much money do you make?” It violates a boundary and creates a disconnect between coach and client…..at the point where the coach is attempting to create trust and intimacy! The client may never be able to articulate what didn’t feel right, but it will feel like a violation and the client will be uneasy about continuing the relationship

DISTINCTION: TELLING VS. DISCOVERING
When is it appropriate to tell the client something you know versus allowing the client to discover what is true for him/her? Especially when emotion is involved, it’s more effective to facilitate the client in creating new neural pathways that will lead to permanent change. When the coach has a direct observation, obtain permission to share what you are observing before doing so.

FACTS ABOUT LASER COACHING
• It is concise and to the point.
• It requires that the underlying truth—what is secret:hidden or unconscious (according to Johari Window).
• It is not the coach’s role to tell the client his/her truths.

MISTAKES COACHES MAKE WITH LASER COACHING
• Getting too focused on the details and circumstances and forgetting the overall purpose of the client’s story.
• Trying too hard to hasten the process.
• Not allowing enough space or silence for the client to process.
• Feeling impatient and/or frustrated because you believe you already know the answer.
• Not getting permission.
• Not stopping when the client doesn’t want to discuss a topic that you believe is relevant.
• Glossing over quick seemingly insignificant comments.
• Not hearing discrepancies.
• Trying to understand the problem rather than the client.
• Not “getting into the client’s shoes ---where the client is coming from”.
• Interpreting information without confirming.

THE MOST IMPORTANT QUESTION A COACH CAN ASK THEMSELVES AND HOLD IN THEIR AWARENESS....
Why is he/she telling me this?

*based on the work of Marion Franklin, MCC
GROUP DYNAMICS

A group is designed as an avenue for:

- Sharing of experiences
- Providing appropriate and constructive feedback
- Generating new insights and possibilities
- Supporting new ideas and thoughts
- Reassuring the courage, the risks and the consequences of new behaviors

Participation in a group may vary from member to member but how to encourage feedback, deep listening and involvement is the facilitator’s responsibility and challenge.

- How to encourage each participant to engage at their individual pace
- Always remind the participants before any activity to only use “I” statements when giving feedback
- To keep the ideas and process flowing
- How to handle the individual who monopolizes the “stage” and to offer support and deep listening and also move the process forward
- Become aware of the subtle energetic cues of the group members
- Be cognizant and responsible to the group’s needs and energy, especially when one participant gets into “storytelling”
- Be able to energetically determine when a specific individual’s story is impacting others in the group, i.e. when their issues are being triggered. When this happens be able to move beyond the “story” to the global lesson underneath.

Conflict is an indication of our shared humanness—a shared outgrowth of diversity and consequences of differences of beliefs, attitudes, perceptions, needs, feelings and habits.

Embracing the differences of each person involves a skilled facilitator who is able to monitor their personal beliefs, thoughts and feelings and to sustain judgment and engage in compassionate listening. Skilled facilitation requires:

- Deep listening
- Clarification for the sake of the group’s learning and understanding
- Consideration of new ideas and possibilities for change
- Encouragement for change and understanding of possible challenges and roadblocks
- An invitation for vulnerability and risk and defining the differences between the outside survival “fear” and the inside fear of vulnerability
- The ability to keep the “wide” view while being focused on the individual’s experience
- Be able to “read” the energy in the group and quickly adjust to keep the process alive. For example: when explaining didactic material can make the assessment of the participants attention and move in and out of material to keep the connection and process dynamic
• Be able to identify internal counter transference thought processes. Not be reactive in the moment and know when to ask for support and assistance from your co-facilitator
• This requires you to be able to sit in uncomfortable emotions without reaction, dissociation or projection

The physical and psychological container, what Kathleen calls “holding the **sacred space of possibility**”: how to do this and the importance of **self examination** in the process. The role of **supportive leadership** and the art of “challenging” old beliefs, outdated attitudes, and unproductive behaviors are all important components in creating and sustaining a dynamic group.

How to **engage the horse** as a supportive and challenging member of the group:

• Offering insights and reflections from the work with the horse as opportunities for change
• Supporting other group members to give their personal observations without judgment or bias
• Remembering to have everyone always you “I” statements and give clear feedback
• Proceeding with caution if certain group members maintain that they know what the horse is “thinking or feeling”, especially if it supports their distorted thinking
• When possible to have the horse in close proximity as an avenue of support and guidance for the individual just returning from the experience with the horse
• Have a clear sense of timing so that each participant gets their time with the horse. This involves the ability to keep the group engaged and interested
• Make sure to give the horse a break between participants. Ideally only work with one horse two times in a row. We must model our care and concern for our equine partners

As the facilitator always remember to ask yourself the questions: “Is this for me or for them?” Group process is not the time to demonstrate your knowledge. Your personal “magic” happens when you can assist the participant in finding their hidden fears, false self messages and dysfunctional behaviors. With this discovery they can move to a new place of expanded awareness and truth.

**Co-Facilitation**

Your co-facilitator acts as your eyes and ears when you are involved with a participant during the body scan and round pen exercise make sure that you always keep them in viewing range when processing with the group. Their feedback and observations are valuable and necessary for the whole process to be complete. You and your co-facilitator should be able to move in and out of each other’s way and create a synchronistic feeling for the group. If problems or discord occur, you will need to be able to hold these with grace and be able to discuss this outside of the group. If, however, you see that your co-facilitator is using leading questions or projecting their opinions on a participant, you
should be able to gracefully move the process along with a change in direction. You should always have your co-facilitator in a position where you can engage in direct eye contact since your look will also help them to see that they may be on the wrong track. This whole year we will be addressing these issues, and practicing through the workshops how to refine your skills for group work. We will use these opportunities to give your feedback and to help your become a better facilitator.

**Containment**

When an individual has a powerful experience either in the round pen or outside as an observer, you will need to be able to contain the experience and bring them back to the present. Often this work will bring up intense emotions, body memories, and PTSD episodes or even past life experiences. The challenge for you is to allow them to have a complete experience without dropping into a damaging emotional state. It is very important to keep the experience from turning into a place of further trauma. This is just another reason we do not do this work without a co-facilitator. You will need your partner to step in and make sure the horse is in a safe place, since you may have to step into the round pen with the participant. Your co-facilitator will also need to be aware of the reactions of the rest of the group. Simple things for you to remember are to breathe, make sure that your feet are firmly planted on the ground and to not be swept away by the client’s emotions or seduced by the “story”. Breath, ground and center. You may even have a reaction yourself; however, it is very important to remain calm and to not dissociate. You can make an agreement with your body, your thoughts and your emotions and let them know that you will address them when the time is appropriate. We are not suggesting that you ignore your personal warning system or stuff your feelings, but that as a professional you contain what is happening to you. Naturally, if this is not possibly you can signal your support team and excuse yourself.

Kathleen Barry Ingram, MA, LLC
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Sample Coaching Call Update Template

<table>
<thead>
<tr>
<th>Client’s Name:</th>
<th>Date: __________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Date:</td>
<td>Time: __________________</td>
</tr>
</tbody>
</table>

Focus for this call:

Mind/Body/Spirit:

Previous week’s wins:

Choices/Actions:

What stopped me?

What moved me forward?

Idea(s) or opportunity(ies) I want to discuss:

What declarations/promises/agreements/intentions will I make that will support me?

Please email this prior to your call: coach’s email
**Sample MLSC Session Menu/Coaching Notes Template**

Client: 

_____________________________________________________

Date: __________

Session # ____

<table>
<thead>
<tr>
<th>Setting the Foundation</th>
<th>Coaching Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Establishing the Coaching Agreement</strong></td>
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<tr>
<td>- Welcome</td>
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<tr>
<td>- Overview of Session</td>
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<tr>
<td>- My Background</td>
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<tr>
<td>- Confidentiality &amp; Security</td>
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<tr>
<td>- Coaching Agreement</td>
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<tr>
<td>- Personal Information Sheet</td>
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<tr>
<td><strong>Co-creating the Relationship</strong></td>
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<tr>
<td><strong>Coaching Presence</strong></td>
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<tr>
<td><strong>Being Present and Connecting</strong></td>
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<tr>
<td>Establish Trust and Intimacy with the Client.</td>
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</tr>
<tr>
<td>- Co-creating the Relationship</td>
<td></td>
</tr>
<tr>
<td>“How Do You Want to Be Coached?”</td>
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<tr>
<td>- Personal Information Fact Sheet</td>
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<tr>
<td>- Emotional Messaging Chart</td>
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<tr>
<td>- Body Scanning</td>
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<tr>
<td>- Primary Focus</td>
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<tr>
<td>- Interview Questions</td>
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</tbody>
</table>
## Communicating Effectively

### Direct Communication
- Active Listening
- Powerful Questions
  - Wheel of Life
  - Powerful Questions: Anticipation
    - What is Possible?
    - What if it works out exactly how you want it to?
    - What is the Dream?
    - What is exciting to you about this?
    - What is the urge?
    - What does your intuition tell you?

## Facilitating Learning and Results

### Creating Awareness
- Designing Actions
- Planning and Goal Setting
- Managing Accountability
  - Emotional Messaging Chart
  - Wheel of Life
  - Journal Sections:
    * Assessment and Goal Setting
    * Coaching Conversations
    * Toolkit
    * Reflections - Powerful Questions
    * Way of Horse Cards

## Homework
- Journaling
- Goals & Commitment & Work Plan
<table>
<thead>
<tr>
<th>Closing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Summary of the Learning</td>
</tr>
<tr>
<td>Client Commitment, Action and Timeline</td>
</tr>
<tr>
<td>Client Resources Articulated</td>
</tr>
<tr>
<td>Clients Support Needs Articulated</td>
</tr>
<tr>
<td>Questions or clarifications</td>
</tr>
<tr>
<td>Follow-up Coaching Sessions set</td>
</tr>
</tbody>
</table>
Content Call #1

“Sacred Space of Possibility”

ICF Core Competencies

A. Setting the Foundation and living the agreement. “The end is in the beginning.”

- Creating the container for our peer group (cohort) includes ways of listening, ways of offering feedback, ways of asking for what you need. Live the material.
- Give well-rounded, actionable feedback.
- “What I’m hearing is ….” instead of a critique (“you did a great job”).
- Listen without judgment.

Remember: As a coach, you are not an expert. This is a relationship of two individuals with different sets of information, both of equal value.

- See the ethics list at coachfederation.com.
- Coaching is not counseling or therapy. You need to make sure the client has access to a therapist, and you need to decide when that fork in the road has appeared—when you’ve gone beyond the scope of the coaching, especially with veterans and families.

B. Co-Creating the Relationship

- Talk with the client about ground rules, expectations, goals, limitations.
- Ask permission to share your experience
- Create your coaching presence: Be who you are. Dance in the moment, follow your intuition. Establish trust and intimacy. Follow where the client is going by listening to what’s happening and responding to what’s being said.

C. Communicating Effectively

- “Active listening” means not thinking about what you’re going to say next or how you’re performing or how to fix the issue.
- Be present and listen—then you’ll know what questions (if any) to ask. Powerful questioning is not trying to ask the right question. If you’re listening, you know what to ask.
• Pay attention: Let go of what you think the right answer is. Support the client in her answer.

D. Facilitating Learning and Results

• Coaching is exploratory and co-creative, but it needs to be balanced with results and actions. It needs to go somewhere to provide the greatest benefit.
• Set the goals and foundation so she can put into action what she’s discovered.
• You and the client co-create and co-own the results. You’re not trying to fix her.

What Is Coaching Handout

• Coaching is transformation-based dialogue, “a thought-provoking and creative process that inspires client to maximize personal potential.” (ICF)
• Focus and maintain restraint. “Just because you can, doesn’t mean you should.” The client may not be ready for that particular insight, or she may not be headed where you think she is. Maintain curiosity and transparency. Be direct for the good of the relationship.
• Meet the client where she is. If she doesn’t understand you, she won’t get the coaching she needs. If you don’t understand her, that she’s not “getting” you, you won’t be able to coach her.
• Practice emotional agility. Be both comfortable and uncomfortable. The horses can be an “authenticity barometer.”
• Be courageous. Don’t be afraid to ask for a moment to pause, or to say, “I don’t know.”
• Watch the messages you’re sending yourself about how valuable you are if you can’t/don’t fix the issue.
• When things start to shift, things can get scary if you’re not ready to live in it yet. Remember the outcome, the goal she’s committed to (usually 3-6 months).
• Create, explore, uncover, reinvent, reassemble, take action, put into your own life.
• Don’t see yourself as “just a beginner.”

The Coaching Journey Handout

• All stages of coaching can be present in one session
• Be careful when “teaching”—you may be trying to fix the client.
• Trust that the right things will come up. Make an agreement between yourself and your emotions: open up a little at a time.
Peer Coaching Call #1

“Just moving through the Core Competencies can evoke a shift in a short period of time.”

Setting the Foundation

- “The end is in the beginning.”
- It establishes a focus for the call (and the relationship).
- It’s important so things go well and you can weather whatever comes up.
- Use the “Getting Started” forms so that you both have the same idea, then clarify the objectives.
- DON’T start coaching before you do this.
  - We have ___ minutes for this call.
  - What would you like to have at the end of that time?
  - What would that feel like? How would you know?
- You need to establish a concrete, definitive goal, so you can identify what success will look and feel like.
- If the client has a hard time pinning it down, take a conscious breath together, to be present, and see what comes up.
- If a client is having trouble being able to feel her body, “Take a breath: Can you feel your lungs?” Start there.
- Listen, and repeat several things that you’ve heard. Ask which one stands out (the issue may in fact be prioritization, focus, decision-making). This should take 3-5 minutes.
- JUST LISTEN AND OBSERVE. Don’t figure it out for the client. You’re there to help her get organized. Listen and pick up on her words. “I’m hearing that it might be helpful to …”

Co-Creating the Relationship

- You are having a conversation together—you are NOT fixing the client. The focus is NOT on you.
- Ask her permission to try things like visualizations, role-playing, etc., so you can establish trust and intimacy.
- Hold the client in a good place, meet her where she is.
- Be yourself, use your toolbox. Dance, play, go light, use humor. Have your own coaching presence. You don’t have to do “heavy-lifting”. It’s her work—just hold the sacred space of possibility.
- Things often shift just from her telling, naming, getting into her body. DON’T underestimate the value of this.
Communicating Effectively

- Meet the client where she is, with her language. Gauge her capacity for using metaphor, etc. LISTEN AND REPEAT. Don’t worry about the formula or model—be fluid, allow whatever wants to happen to just happen.
- Be clear, direct, articulate. Use her words. If you clarify or simplify, check in to confirm that you haven’t changed the meaning.
- Try not to use yes/no questions. They elicit compliance. Try asking, “Tell me more about that.”
- Don’t dilute your question with rapid-fire, multiple versions of the same question. Often the first version is the best.
- Notice how your language affects her.
- You are listening for patterns, connections. One call is a piece of a bigger picture, the “meta” view. You can save the pieces for later as you learn about her belief system.
- Don’t focus on doing something “better,” but rather “differently.”

Facilitating Learning and Results

- For longer-term clients, you co-design actions and monitor progress, with check-ins and accountability:
  - What is your goal?
  - How would this show up long-term for you?
  - What are you taking away from our session? (This might be different from what you thought, and having her say it creates a commitment on her part.)
  - You started this call by saying...
- Listen for subtle shifts in energy. If she is “thinking” too much, do something to shift the energy. “Problems cannot be solved with the same mindset that created them.” (Einstein)
- The horses are a different level of engagement, they help us recognize these energy shifts in ourselves and then we can bring them to the client.
- Ask:
  - How did that feel? Describe what you felt…(this makes it more real)
  - What does that mean about you?
  - What happens if …(you can help anticipate barriers)
Content Call #2

“Coaching is an art.”

Looking at the Co-Active Coaching Model (see star diagram)

4 Cornerstones (must be present)

- People are naturally creative, resourceful and whole
  The coach is not the expert. You guide, but don’t control. It is a partnership of equals. Whatever happens is perfect.

- Dance in this moment
  There is no template. If you have set the foundation and co-created the relationship with rules, boundaries and trust, the sessions can take on a life of their own.

- Focus on the whole person
  Hold the space and see the client as she is now and as her potential: what she decides is possible by discovering meaning, finding balance, making choices. Focusing this way lessens your desire to fix the client.

- Evoke transformation
  The coach evokes, the client explores. The shift doesn’t have to be a huge metamorphosis. Look at deeper patterns, pose open and curious questions to help the client reveal new options to apply to practical matters to get new results.

3 Approaches (possible issues that can be present separately or in combination)

- Fulfillment coaching
  Working towards the joy of living life from one’s own choosing, in alignment with deep values, as a way of being. The horses show this. If there’s a lot of emotion coming up, there’s incongruence. Teach the messages behind the emotions, ask where she feels it in her body. She can learn to recognize the wisdom in her body and see the lack of alignment with core values. Use the Heart’s Desire or Leading With Awareness experiences with the horses.

- Balance coaching
  When someone is overwhelmed with “shoulds,” “have-to’s,” you can help make a bigger perspective visible. The client is stuck between fact and interpretation and is unable to enjoy the diversity and feel in control of life. You can shift the story towards more balance.

- Process coaching
The client can’t experience in real time what is actually happening in the present. The horses can help her slow down, see what she’s avoiding, repressing or rationalizing (no one is acknowledging her, she can’t get ahead, she refuses to celebrate her successes). You and the horses can help provide a safe place to experiment with what she can’t feel. She can rely on inside information (the messages behind emotions) and not blame the outside. Slow down, recognize patterns of thinking and behavior, how this shows up in life. If she can feel and process inside, she can move on to self-management.

5 Contexts (methodologies, move into and out of these)

- **Curiosity**
  Approach with openness and wonder, as a gift to the client. Ask questions you do not know the answer to. Then the client becomes the expert and has the opportunity to remember what she knows.

- **Listening**
  Level 1: What you hear (words)
  Level 2: Focus on the client (what’s behind the words)
  Level 3: Everything that’s heard and felt.
  “Meta” or Level 4: Energetic, somatic, intuitive, systemic. You, me, and the environment. And what it all means. You are experiencing two subjective states simultaneously, sharing the spatial and the energetic. Being with the horse in the round pen, sharing EM field and emotional agility.

- **Intuition**
  This is the pure impulse, not filtered through logic. Arises inside, faster than the brain, your gut feeling. Just go for it. Ask when you’re setting the foundation in the beginning if it’s OK to follow your intuition.

- **Deepen-Forward**
  Deepening = what’s going on below, slowing down the process
  Forwarding = concrete, practical.
  You need to address both: too much deepening = “navel gazing” and too much practical = banging your head on the same wall again and again and expecting the result to be different.
  “No matter where you go, there you are.”

- **Self-Management**
  Always practice this in the background. You and the client are a system. You are impacting her whether or not you’re aware of it. You don’t always have to be saying something. Silence allows her to reflect, create, process. Discern when to act. “Just because you can, doesn’t mean you should.”

**Co-Active Designed Alliance**
Coaching from the heart is reciprocal. When you co-create the relationship, you are contributing to your learning by holding space for the client.

Michelangelo chipped away at everything that wasn’t David. The horses do the same for us.
Peer Coaching Call #2

- Find your voice within the principles of coaching. No one can offer exactly what you can. Hold your vision, notice, pay attention.

- Become discerning and genuinely curious about your listening. Notice what’s going on in you. See yourself as creative resourceful and whole. Ask yourself whether the feeling is yours, the client’s, what it means. Practice emotional agility. Coach from this place.

- How to redirect when the conservation strays:
  Check in and remind the client of the goal: “Is this helpful towards getting you there?” Then she can connect her own dots (which might not have been obvious to you). You’re not regulating or controlling the flow; you’re still listening and just asking if that’s where they want to go.

- Ask, don’t tell. “Would you be willing to ….”

- Notice when phrases are repeated, little chuckles, coughs, or throat-clearing.

- As the guide, be aware of where the client is. Use breathing to move out of the head into the body. Use the body to help get clarity.

- Notice when something comes up in you, distraction, etc.; e.g., “I noticed when your breathing shifted, and it caught my attention. Can you repeat that?”

- Constantly scan yourself and check your curiosity and intuition. Questions come from inside and are not formulaic. This happens when you are listening on the 4th level.

- It’s OK to be a cheerleader—just pay attention to why, when, and how you are cheering.

- Hold the silence, don’t interrupt their flow. If you’re not sure, you can always check in by asking “Are you breathing?”

- Ask permission to share your own experience.

- Ask, “How can you move forward?” “Is it important to you?” “How does that impact what you’re going to do tomorrow?”

- Ask, “How are you inspired to hold this?” not “What are you going to do?”
Content Call #3

“A fish doesn’t know he’s in water until he gets out.”

- The goal of coaching is to help the client uncover their underlying story and see how it either helps or hinders what they are trying to achieve. (The Leading with Awareness experience shows our energetic default structure, where we get in our own way.)

- Look beneath the presenting issue (the Agenda) for the bigger issue (the agenda). The presenting issue is just what’s being manifested in the present moment. Any issue will put you in the same boat, because the underlying view is always the same. “No matter where you go, there you are.”

Structures That Inform the Coaching Conversation (see handout)

Use these to inform, to help you focus and listen for what’s underneath the words, the underlying view that’s running in the background. Don’t use them to diagnose or label the client.

- Ambivalence: When someone can’t decide or make a commitment. You can ask, “What do you need to know? Flip a coin and see what you feel when the coin lands.” But it’s not about the decision. It’s about the underlying ambivalence, the fear of making the wrong decision.

- Authority: When someone doesn’t want to be told what to do or is a victim.

- Abandonment: May be behind someone who doesn’t like to take risks, needs security.

- Alienation: mistrust, feeling unloved.

- Integration: Sometimes a seeker is looking for transformation. Need to look at an issue from a systemic place and ask permission to approach this. She may not be ready to go there.

- Abundance: She believes “it’s all good,” “there will always be enough,” and can use this to avoid specificity on what she needs to do. It’s a challenge to focus and get clarity, specificity on what she needs to do. She needs to own her contribution.

All of these structures are integrated. They also include their opposites, like two sides of the same coin: abundance-scarcity.
Your clients are mirrors of who you are. Notice, practice self-management and emotional agility. Watch how you’re experiencing things and how your feelings and experience inform the interaction between you and the client.

Use the structures to help you look at the bigger issue, not just the presenting issue. The presenting issue is just how the bigger issue is manifesting in this particular moment. Remember to keep the issue grounded (not so “airy”) and attainable/accessible.

Work with the “hidden” issues through metaphor, through horse cards, emotion cards, etc. Let her awaken and create insight herself and experience that insight in her body. Then she can own it.

Context, Purpose, Results (see handout)

CPR is a tool to help with clarity, to help focus, to help create conscious intention and results. It’s a way to begin and it gives the client something to take with them. You could do this on a form sent 24 hours before session, so client can stop, attend to themselves, prepare.

- **Results**: Make a list of what you want to get: concrete, attainable results that are measurable (do this both in a coaching session and in the round pen).

- **Purpose**: Why is it important to achieve this? How will your life be different if you do (or if it happened during session).

- **Context**: The mindset from which you operate, the “default” attitude. You need to see how this structure or pattern operates, make it conscious, so you can see how it is or isn’t furthering your goals, helping or hindering you.

  When you are discovering or reframing the context, say it out loud. Makes it more real, you hear yourself saying it, you can hold it. Draw a picture to describe it or do a round pen exercise to anchor the re-framing. Then if you get bogged down, go back to the context, the picture, the bodily experience.

**Powerful Questions**

See the Coactive Coaching list and the Alain Cardon handout (Question Skills in Coaching). Use these to remind you that questions can be short, succinct and that it’s not about fixing the problem. Be curious, direct, pay attention to where the question lands. Don’t be formulaic. It’s more important how you hold the space and notice where the question lands. Ask the question from your heart. You don’t have to do anything but listen and hold the space with curiousity.
Peer Coaching Call #3

Details about setting up peer coaching triads and completing peer coaching journal.

Content Call #4

Horses teach us how to coach by bringing to our consciousness that which is unconscious in ourselves. The horses embody the skill set we need to use as coaches. They are our “co-coaches.”

Self-management: We need to know ourselves because our “stuff” impacts the coaching relationship.

Use Karla McLaren’s tools throughout a coaching session—especially one with horses—to show that behavior is a choice.

- See The Language of Emotions, Building Your Raft, beginning on page 125, especially grounding and burning contracts.
- As a coach, you can hold the space during conscious complaining. Hold the space regardless of what comes up—just be aware of the context.

Going through the “False Self” exercise helps you know who is showing up, either for you as the coach, or for the client in the round pen. It brings us into congruence. (See Riding Between The Worlds and The Way of the Horse (page 25-29).

- You need to create a common vernacular with the client. Take baby steps, check their understanding, then share the concepts and relate the discussion to their experience with the horses.

False Self: A conditioned personality that always consists of negative behaviors that are not helping you, that block you. You may or may not be aware of them.

Shadow: A part of you that is always unconscious, the “black horse wisdom” that includes different, unconscious aspects of yourself. The good + bad = wisdom.

- See Robert A. Johnson’s Owning Your Own Shadow, and Debbie Ford’s Dark Side of the Light Chasers

Authentic Self: ALL parts of you. For example, white light includes all the colors. The good/bad duality is always relative to your environment—it is not absolute.

Transference: An unconscious reaction to something happening in the present as if it were something in the past, some event during which the feelings weren’t accepted. So all that “gunk” is still swirling around in you. Can be positive or negative. For example,
if you’ve had a negative experience with authority in the past, you might transfer those feelings onto someone in an authority role now.

Projection: Occurs when feelings that are not acceptable for you or acknowledged in you get “projected” onto someone/something else. You’ve got to find somewhere to “put” them. Usually the other person does possess some of the qualities you’re projecting onto them. They can be positive or negative; for example, you might admire someone because they possess qualities in yourself that you can’t acknowledge.

Practice emotional and energetic agility. Don’t judge what’s happening, just notice the emotion and the message it’s sending, get information from it, do what you need to in order to restore the flow, use forgiveness statements, and then go back to grazing. If the energy you feel is disproportionate, spend some time being curious and looking at what’s going on.

Check the “door knob” of your boundary. If it’s on the outside, someone can barge in and dump stuff on you. If it’s on the inside, you get to choose to whom and for what you want to open it. Likewise, watch what you dump outside your boundary onto others, or whether you never open the door.

Aim for a balance between your own personal transformation and mastering equine-assisted coaching.
Peer Coaching Call #4

Setting up the coaching contract/relationship

- In every call, always review, renegotiate a “new” agreement based on “who” shows up at that moment.
- The agreement is always dynamic
- Always check in with the client
  - Can I share my idea . . .
  - Ask permission to breathe together, to do a body scan.

This allows for continuous co-creating of the coaching relationship and brings the client into the decision-making process.

Deepening and Forwarding (see Coactive Coaching)

Forwarding = action, goals, movement (the action may be stepping back in order to reground and assess, to fully embody and anchor the last insight before moving on to step into the next level of learning).

Deepening = learning, insight, awareness, feedback

Focus on the Whole Person

- Who they are now, and who they will be in the future (possibilities)
- Their conscious and unconscious aspects
- Their implicit and explicit sides
- Their whole life (home, work, parents, kids)
- Their physical, emotional, and energetic selves

Enrollment Conversation:
This is about discovering whether you and client are a good fit. Focus on the whole person. Dig down to what’s really important:

- Where are you now and where do you want to be?

Establish why YOU are the coach to help them work towards their goal. You’re already coaching during this conversation, but be aware of trying to fix them or solve the problem.

Understanding and Solutions:
- This could be an action plan or a to-do list (easy to measure).
- It could also be an insight, a realization, a shift in awareness, a change in feelings (harder to measure)
- Might also be stepping back to re-ground and assess. Embody, anchor the last thing that arose before moving on to step into the next level of learning.
Honor the client if she says she’s done for today, regardless of the time. Don’t project your view of the value you’re providing, the work she’s done (it’s about the session, not the number of minutes).

YOU hold the goals, in order for her to continue to learn and move forward.

Points from today’s practice coaching session:

- Ask permission
- Ask for specifics about the story
- Check in on feelings in her body (where is that living, what’s the message)
- Acknowledge the “bigness” of the emotion that arose
- “What would have happened if . . .”
- “What does that/did that mean to you?” (allows her to figure it out)
Content Call #5

“How you do anything is how you do everything.”

See the Multi-Level Systemic Coaching Model (MLSC)

Coaching needs to take into consideration everything that’s happening in a person’s entire life. It’s not one-dimensional (compared to corporate coaching). It’s about the belief that we are all connected in a larger whole and then coaching from that belief.

MLSC incorporates the levels of:
- Coaching (using the coactive model)
- Systems development (everything is part of the system)
- Emotional and energetic agility (what the horses teach)

Coaching
Takes the current situation and moves it towards the ideal situation using exploration of what needs to happen differently, interacting with information, encountering roadblocks, experiencing shifts, identifying actions that lead to results, sustaining the change.

Systems Development
The “system” is what is keeping the client from getting there or it could be what can support the journey. Ask questions about these so the client can discover and see it herself.

- Holistic approach: looks at everything
- Patterns: what does the client see? What do you see?
- Alignment: congruency between inner and outer worlds
- Systems: you signed up for transformation; the others in your life didn’t, but the whole spider web is involved
- Culture: meet the client where she is, given her cultural structure (e.g., Hispanic)
- Structure: how the client is set up (e.g., does she show up on time)
- Processes: how does she get things done?

Emotional and Energetic Agility
Energy has an effect. Listen at Level IV, notice and observe. The horses help with this. Use the Johari window activity (public, blind, secret, unconscious) to provide information. Ask questions to get information, so the client can recognize it too.

Practice self-management with this level, so you can notice what’s yours and what’s the client’s. Then practice agility and let it go.
Key Elements of MLSC (see handout)

- Align (congruence)
- Assess (discover patterns)
- Engage (use the four levels of listening)
- Explore (together, to help client gain insight)
- Strategize (co-create next steps)
- Action/Results (how to sustain change)

See the Guidelines to MLSC handout

- Coaching begins at the moment of contact, “the end is in the beginning.” Co-create a clear agreement, meet them where they are.
- Consider the system, the whole person, what’s happening in their entire life.
- How does it hinder or support the client? How she does one thing is how she does everything—it shows the pattern. In a session, you are superficially extracting an issue from the whole person/system. She needs to understand the system in order to sustain change.
- You are energetically affecting the session. Continually practice self-management and notice if you feel energy, a morphic resonance. Notice and ask if this is yours or hers (as we do in the Boundary Dance or Meet The Herd activities with the horses). Be agile when you think you know what should happen: let it go—don’t build an agenda around it. Notice how to be yourself, to add value, and be of service to the client.
- Follow the path of least resistance. You don’t have to go where there’s a big issue, a big wall. Go wherever you can to get some change. See where else in the client’s life the pattern is showing up, where it’s easier to access.
- In the short term, what’s the biggest win for today’s session? The client wants to feel like she’s making progress. It could be holding something differently or completing the homework, or just being on time.
- The client is often a mirror of you. You attract clients with the same issues via projection. Just notice and let it go.
Peer Coaching Call #5

Key Elements of MLSC handout

**Align**
Co-create the relationship, not only at the start of the contract, but in every session. This includes establishing trust and intimacy, through confidentiality.

**Assess**
Incorporate the body, getting out of the client’s head. You can use the Leadership Cards as an assessment tool and ask where else she does “X” in their lives. Assess yourself too. Assess the coaching relationship, energy, how a question lands, etc. Look at how she prioritizes and organizes things in her life.


**Engage**
Notice how the client responds to questions. The presenting issue might be where the resistance is, but look at the whole person and system.

Sample questions from today’s practice coaching:
- Is this how you handle other areas in your life?
- Where else does this show up?
- What’s your story around this?
- What if you dropped that story?
- Remember the experience of “X”, the smell, feeling, sound. What belief did you hold around that moment?
Content Call #6

Vulnerability
The message from vulnerability is “something is about to be revealed.” The status quo is being challenged. Vulnerability can be an asset to you as coach and to the client and horses. (Compare vulnerability with fear: “what is the threat?”)

ICF coaching is more about not knowing. As the coach, be OK with not knowing how something is going to happen in the round pen. Hold the space without an agenda.

The client may be ashamed, afraid of ridicule, of being outcast, or afraid of her own greatness. In the moment when vulnerability appears, let it ride for a moment so that a shift can occur.

But be aware of the client’s window of tolerance. It may be that only one feeling or “ah ha” can happen or appear at a time. Let her make an agreement with her feelings, where to stop for now.

The client’s environment may not be supportive. As coach, you can support her vulnerability and awareness (in contrast to consulting, where you provide expertise and tell her what to do).

The horses help with this because the horses don’t judge. They can help her become comfortable with vulnerability, one step at a time. Use them to expose vulnerability and then weave that feeling and experience into the rest of the coaching work.

What is the goal for the client? What is her measure of success? Allow it to be whatever it wants to be—it may be different from the initial goal or focus of the session.

If you’re feeling vulnerable, step into it—otherwise, what wants to happen may not be revealed. You as the coach can model vulnerability for the client.

Vulnerability can be a barometer for how strong your boundaries are. Use the feeling of vulnerability to discern this.

The window of tolerance may be different as an individual vs. being in a group. Make an agreement early in the group experience—are people comfortable with sharing observations at the moment, or later? You can ask this on an intake form.

Be aware that the group has a collective False Self and fear of vulnerability. It may take one person to make the decision to go deeper into vulnerability and thereby give permission to the whole group. Hold the space and let go of the façade of what it’s supposed to be.
Learning and Results
These don’t have to be measurable (but may be when coaching borders on consulting). The horses can help us integrate mind-body awareness into learning and results.

Don’t get hooked in the story. Look for what’s going on behind the request, what she’s doing that’s getting in her way, what’s supporting her (look at the whole system).

If someone has problems taking action after a moment of awareness, THAT’S the next coaching question: “Is avoiding action a pattern?” Then help design actions that actually give successes; e.g., co-create a plan, organizing, sending an email with information. Set milestones—changing patterns and beliefs may be enough. Doesn’t have to be a BIG CHANGE.

Always draw on created awareness to support actions. As with the horses, you co-create the agreement and mutual connection.

Set the foundation in the beginning for managing accountability, for not following through. For example, “What happens when you or I don’t do what we say? Do we just bring it up?”

If it feels like as coach you’re working too hard, you probably are. Pay attention to what your definition of success is, and how that drives your role in designing actions and accountability. How are you judging learning and results?
Peer Coaching Call #6

Coaching is a way to acknowledge upheaval for yourself, step out of it, and be present for your client. We hold the sacred space of possibility for learning about self, others, and the Collective. Everything you need to know will come to you as you deepen and forward your coaching and development.

Review of Core Competencies

Setting the Foundation: It’s a safety net, the sacred container for when things aren’t going smoothly.

Co-creating the Relationship: It’s not about being the expert. The learning and agenda is from her perspective, how that impacts her life. Notice and breath into it when you feel yourself reacting or becoming a guide instead of a partner. Just step back and notice—don’t judge. The relationship is built on trust and intimacy.

Communicating Effectively: Actively listen to what is going on beneath the words. Questions come from what is evolving, what you are curious about. Speak directly.

Facilitating Learning and Results: From the awareness you create together, what is different in her life once she has that awareness? How does that impact her goal? Designing action requires accountability—how has she been showing up? Does she know how to manage goal setting? Observe this relationship and coach from that place.

There’s a flow to all of this, and you might have to start over now and then.

Tools for Setting Up the Foundation and Creating the Container

- “Getting Started” sample coaching agreement. Personalize it with your own info and brand.
- Fee: Be really clear what the fee is, what service you are offering, what happens when something extra comes up (additional fee? negotiate?). Packaging options will be covered in the Business Basics module.
- Period: Duration of coaching relationship, how often, how long. Have this in writing.
- Contact information: How is she going to connect with you? Have her contact info (text, email) if the conference line fails. Might include birthday, etc., as a nice personal touch.
- How are you going to manage changes, cancellations? What will help you manage your time? Do you offer restitution if you have to cancel on short notice?
- What if you go over the time limit? Is there an additional fee? (Rare)
- Communication: How will you discuss problems? Make sure they can be really honest and have a safe place to share what’s not working. You want to be able to help them move on and find someone who’s a better fit.
• Have some samples about “What is Coaching?” You are respectfully holding space for a conversation with genuine interest and curiosity and, by asking questions, helping them connect with their own personal genius.

• Be clear about what you expect from them as a client and what they can expect from you as a coach.

• Include your vision, philosophy, mission statement. Include a questionnaire, assessment, about where she is now, where she wants to go, how important is it to her to reach this goal, how would it change her life.

• Have a form to send to people who are interested but not ready to be coached yet. Or have an assessment on your web page. Include questions that help her get in touch with what she wants for herself, what’s possible. If she feels that you can hear what she’s trying to express, she can trust you to help her get there.

Align what you’re doing, who you’re serving, what you have in place to support and share with them.

**Discovery session vs. sample session**

• A discovery session is still coaching, but you are exploring what coaching is, how it would benefit her, and if you’re the person that can understand her. You might have an insight on what she wants to have happen next, but first you need to determine whether she wants to continue with coaching and if you’re the coach for this period of time in her life.

• A sample session is a regular coaching session, creating the container, etc. The only difference is the price. You can use your regular agreement document, strike through your normal fee and write in “complementary.” You want them to understand the value of what they’re receiving.
Content Call #7

Therapy is untangling information from the past. Coaching is working on a plan to move forward into the future.

Sometimes trying to move forward gets tangled in events from the past. Be curious about the patterns and messages and support the client by asking her what she can learn from them.

Instead of analyzing why she is sabotaging herself, just notice that she is getting in her own way.

Emotions come up when working with the horses. You can use the Emotional Message chart to help the client find out more about her patterns. It’s a tool to get beyond being tangled.

In systemic coaching, we are creating the sacred space for the client to reveal her own systems to herself. We don’t know our own repetitive patterns and the impact they are having in creating our own reality.

The horses mirror our behaviors energetically, without words, through their behaviors. They’re not Ouija boards, or reading our minds.

Glossary of Psychological Terms (see handout)

It’s important for us as coaches to know these terms so we don’t get ourselves into situations that we can’t handle, so that we stay within the boundaries and ethical standards for coaching. When we can understand the processes that are going on, we can respond accordingly within the scope of our capability as coaches. If you see certain patterns that may be beyond your ability, or if you see the client is unable to move forward, talk to Lisa about it.

Transference: Something similar happened in the past, and you’re bringing it into the current situation. Can be positive or negative.

Projection: A person’s true nature is obscured by feelings that she refuses to acknowledge in herself, and she projects these onto the facilitator or the horse. Can be positive or negative (e.g., hero worship). People also anthropomorphize the horse (Mr. Ed effect). “The horse is telling me this,” as opposed to just feeling the communication and connection. As a coach, projecting can get in the way of being curious about the client, of not being a true mirror for the client because we think we know more than she does. Or the client might be projecting—notice inconsistencies in her story or behavior. If there’s not a clear flow, be curious.

Introjection: When you believe someone else’s projections, what everyone else is telling you.
Countertransference: The emotional reaction to the client. When you notice some energy around a topic or a person, be curious about what’s going on deeper in yourself. How is the client just like you?

Corrective emotional experience, aka limbic revision: When we experience something with the horse and are able to shift the feelings about a memory so that we have a different way of experiencing that situation in the future. This is the most important and powerful part of working with the horses—they help the client perceive herself differently by replacing past thoughts or feelings.

The remainder of the terms are examples of the processes we go through as we are trying to shift from one state of feeling to another. Just notice them, and notice inconsistencies in the pattern.

Putting It All Together (see Coactive Coaching, Chapter 11)

Move the client to where she wants to be, not where you think she should be.

Coaching is an art. Personal development is different from business coaching. Emotions and body messages are more poetic, rather than concrete and linear.

The client sets the agenda. Use tools based on what the client needs, what wants to happen, not because you want to use the tool because it’s cool. A tool might help excavate what needs to happen, but using it is not the objective of the session.

Have faith that things will unfold as they are meant to if you just stay out of the way. Just by showing up, you are impacting—you don’t need to do anything else.

If the client shows up talking about needing balance, you might use a life balance wheel. Draw a circle and carve it up into sections to represent each aspect of life. Get a visual of what’s happening so you can get out of your head.

Coaching vs. consulting:
It’s important to define what role we are playing at any given moment so the client is clear. Also important when you collaborating with a coaching partner. Respect each other’s expertise and clearly define the roles.

You and your client are on equal footing; although your skills may not match, they have equal value. How to share information if you have more expertise? Ask permission to offer it. Then the client asks for it. Also notice her pattern of asking (or not) for your opinion or help. (“I can share this if you like, and then you decide what to do with it,” vs. “I think you should do this.”)

Likewise, if you’re in a consulting relationship and you notice certain behavior, you can ask offer coaching around it. Something might need to be uncovered.
Dance in the moment, don’t get hooked by the story, don’t focus on the task (this is the default for people who like to help and want to fix), don’t be attached to the outcome, practice emotional agility.

Mix the balance of short- and long-term goals.

Group coaching:
It’s important to realize that you are dealing with a lot of different individuals as well as “the group.”

- You need to hold the entire group, because the group is having an experience and an impact on the experience of each individual.
- Make sure people are present, with both feet on the ground, see whether each individual is part of the group. You have to manage the energy.
- If there are more than 4 in a group, you need to have a co-facilitator, plus the horse handler. The impact of the group energy can be so big, make sure everyone is safe.
- Have the group hold the experience and be accountable for what’s happening in the round pen or during a coaching moment outside the pen. Have them notice as a collective that they impact the environment.
- Facilitate all of that energy, and have each one take away something meaningful, notice within themselves. That’s another take-way: greater consciousness of the impact of the group.
Peer Coaching Call #7

Points from today’s practice coaching sessions:

- Use the Emotional Message Chart when the client names an emotion. Go ahead and ask the questions from the chart. You don’t have to delve into the whole explanation of the chart. You don’t have to make it up yourself. Just use the existing questions and see what happens.

- Problem-solving might not give the client what she needs. Just talking about it might reveal a pattern that she can explore.

- Focusing on a positive outcome: See what happens when you reframe a negative belief into a positive one (e.g., “If you could wave a magic wand and change …..”). But be sensitive to describing a client’s state as “negative.” She may perceive that as a judgment. Just notice this yourself and use it to guide you in the conversation. It’s more about shifting the perspective.

- Way of the Horse, Chapter 15: Vigilance. Be aware, play with the difference between fear (external threat) and vulnerability (internal threat). You may feel vulnerable when you realize your own greatness and power. You don’t want to embarrass yourself, to be seen as “less than.” Judgment comes from the False Self or the ego not wanting to let go of the status quo. As you move into a new space, notice if you’re feeling vulnerability around your work and calling because of how wonderful you are.