

Guidelines for Drawing up a 'Contract' for a Coaching/Mentoring/Supervision Relationship

Contracting is a vital element to building the coaching relationship and ensuring both quality of the coaching process and a sharp focus on coaching goals/outcomes. This can be very valuable in co-creating agreements for how coach/coachee will work together, highlighting any expectations and setting clear/measurable objectives. These agreements can then be a reference for reviewing progress and ensuring alignment with coaching objectives/purpose/context – as sessions progress...

Key areas covered in here are:

- Chemistry and understanding
- Setting and reviewing objectives
- Confidentiality
- Legal duty and safeguarding
- Logistical arrangements
- Involvement of line manager/sponsor
- Any boundaries/conflicts of interest
- Feedback and evaluation

Below are some suggested points to discuss. Please bear in mind that the discussions can often happen in any order and prompts are contextual so may apply to some coaching relationships and not others...

Introductions/Chemistry

- The coach/mentor style, philosophy, skill/focus areas, background, values, ways of working, success rates
- About coaching and different types (if applicable - including differences to therapy/mentoring)
- Explanation of coaching processes/sessions and any expectations (e.g. tools, ownership, preparation etc)
- Collating data on coachees current/wider context (including organisational/system if applicable)
- Any expectations or assumptions for coaching relationship e.g. openness/honesty/commitment/presence
- What's the coachees/sponsors/organisational purpose for coaching...what would success look like
- Inviting questions/clarifying understanding

Logistical Agreements

- How often, when, where, how long will sessions be, is there a confidential/uninterrupted space
- Who's responsible for setting up meetings, taking notes (if applicable)
- What are the arrangements and limits for cancelling/postponing sessions
- If an organisation is involved, are there any logistical requirements/limits
- Contact in between sessions, including questions/concerns/feedback

Other Areas for Exploration/Agreement

- **Organisation** – is there an organisation/system context to be included or considered, how this may affect the coaching relationship(s). What does the organisation or coachee want in terms of wider objectives and/or linking up with values, behaviours, OD frameworks
- **3 + Way Contracting** - Is there a requirement or desire to involve the line manager/sponsor, if yes confidentiality agreement of what will be shared with them and any other needs
- **Confidentiality** – including any conflicts/reporting to sponsor, what may be taken to supervision or CPD
- **Relationship(s)** – how will you work together (and with organisation/sponsor/manager), what's the level of support/challenge wanted and is this in alignment with your skill/focus/philosophy. When will you review, feedback to each other...how will you handle it if something comes up in the relationship on either side or with any stakeholders
- **Boundaries/Conflicts** – any limits to the scope of discussions or interventions, conflicting relationships, boundaries on either side with logistics/ethics/sharing information/data protection/disclosures etc
- **Legal Duty/Safeguarding** – what is coach/coachee context with this and what happens if this comes up, is there a safeguarding policy, signposting to other services
- **Progress Review and Feedback** - how will we check-in with each other (and the organisation if applicable) to ensure we are on track, how will any issues will be resolved, who is to be included

Updated May 2025 – NB: created originally from a leadership/executive coaching context and focuses on the overall relationship

- **Completion** - how (and when) will completion happen, what happens if either side wants to complete/finish early
- **Evaluation** – what's the process for evaluation, how and what data will be collected...e.g. feedback forms. Whether evaluation is only self-assessed or also from others (e.g. 360/organisational/clients/partners etc). If sponsor/organisation/line manager has been involved how will evaluation be collected/triangulated.

Setting Coaching & Relationship Purpose/Objectives

- Overall aims and purpose for coaching (including what's the context of the relationship, i.e. coaching/mentoring). How will we know if we go off track (linked to feedback above)
- Does the coachee have any specific wants/needs in terms of levels of support and challenge
- Review/inclusion of any data (i.e. wider objectives/values or behaviour frameworks/performance)
- Setting objectives and identifying how this will be measured (e.g. ratings scale, to enable review during/at completion)
- What/when will reports, if any, be made to line manager/sponsor/organisation

The Golden Learning Opportunity of Agreements

In my experience 'contracting', the exploration and setting of agreements, can be a wonderful tool to reveal to us how we and our client's handle the co-creation, setting and – most fundamentally – commitment to agreements.

This can lead to exploration of what was triggering or evoking us, or indeed really going on for us in the process. In my experience, this is where there can be deep and powerful learning for us in terms of how we behave (show up) as a coach/mentor/supervisor – and most delightfully is usually behaviour that is mirrored in the rest of our lives.

Our relationship with commitment, keeping (or not) of our word and how we handle this can be a beautiful window into what 'lens' we see ourselves, others and the world. And it is this 'lens' or frame often dictates how we behave (show up), including how we 'react' to what's happening in the conversation. The awareness of this 'reaction' is what Viktor Frankl referred to in his famous quote.

Between stimulus and
response there
is a space.

In that space is our
power to choose
our response.


In our response
lies our growth and
our freedom.

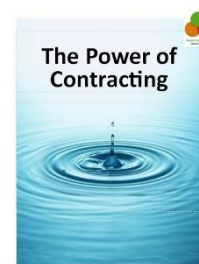
Viktor E. Frankl




For a deeper dive into what's on offer in this space, please see my more comprehensive 'The Power of Contracting' creation which includes:

- An expanded contracting guide
- Reflections on applying learnings with contracting to the rest of your life
- Case study
- FAQs!

I offer this with love and the intention of creating more awareness in the world. My purpose is to, hopefully, enable greater consciousness of everyone's ability to 'respond' with awareness rather than 'react' with automatic (old dated) patterns.

You can access this here for only £9.95 



Please do connect with me on  to get to know each other better and let me know any questions, reflection, feedback  

@Designed and Developed with love by Nicci Statham Master Executive Coach & Coach Supervisor
supervision@awareleadership.co.uk