Pro Bono Program Toolkit

The ICF Foundation has compiled tools and templates to help your ICF Chapter conceive and execute a pro bono coaching activity that will help individuals and organizations in your community experience the transformative potential of professional coaching.

The ICF Foundation works to make a positive impact on the world through coaching. The Foundation was established in 2004 by passionate coaches to exclusively support education, research and charitable purposes. While a separate nonprofit entity from the International Coach Federation, the ICF Foundation is bonded in partnership with ICF Global. As a Foundation, we aspire to nurture the innate desire in coaches and ICF Chapters to give back to their communities.
## Action Item

### Six to 12 Months Out

- Identify the initiative or event your chapter will organize.
- Pitch pro bono coaching services to organization or conference.
- Determine budget.

### Three Months Out

- Establish criteria for participating coaches.
- Invite members to volunteer as coaches, booth staff and coordinators/liaisons.
- Order/print collateral and signage for program, if needed.
- Work with partner non profit or NGO organization or event host to identify candidates for coaching. Begin communicating to this audience, if possible.

### One to Two Months Out

- Provide training call for confirmed coaches and distribute worksheets they can use during coaching sessions.
- Send communication to confirmed clients about logistics, as well as what they can expect from the coaching process.
- Send a media alert to local news outlets and post a news item on your website.

### Two Weeks Out

- Send follow-up communication to clients containing the pre-coaching questionnaire.

### After Program Ends

- Send follow-up email to clients with additional information and next steps.
- Post news item and/or blog post about the event on your chapter website.
- Email ICF Foundation Marketing and Outreach Director, **Amy Friskney**, to share your initiative and outcomes.
- Consider applying to the ICF Foundation Gift of Coaching Awards program.
Templates and tools:

- Checklist for Pro Bono Liaison
- Client Agreement Form
- Client Evaluation Form
- Coaching Questionnaire
- Client Worksheet 1: Peak Experience
- Client Worksheet 2: Life and Energy Wheel
- Client Worksheet 3: Mind Map
- Client Worksheet 4: Reframing
- Community Coaching Outreach (CCO) Committee Requirements
- Community Coaching Outreach (CCO) Committee Roles and Responsibilities

Templates adapted from resources provided by ICF Metro DC, ICF New England and ICF Raleigh.
<table>
<thead>
<tr>
<th><strong>Action/Document</strong></th>
<th><strong>Notes</strong></th>
<th><strong>Done</strong></th>
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<tbody>
<tr>
<td>Get a copy of the agreement between ICF Chapter and the partner organization.</td>
<td>Edit as necessary and return final agreement (if edited) to chapter board.</td>
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<tr>
<td>Contact prospective volunteers and introduce yourself as point of contact for the initiative.</td>
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<tr>
<td>Collect coach interest forms and make final detailed list of pro bono coaches and other event/initiative volunteers.</td>
<td>Coach interest forms should include email address, phone number, years of experience, credentialing and training info, and a brief professional bio.</td>
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<tr>
<td>Contact point of contact with partner organization to set up initial meeting and, in the case of a long-term initiative, information session for coaching clients.</td>
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<td>Provide coaching agreements to partner organization’s point of contact for clients to complete.</td>
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<tr>
<td>For a longer-term initiative, check in with partner organization’s point of contact and volunteer coaches periodically to ensure that sessions are being scheduled and running smoothly.</td>
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<td>Troubleshoot as necessary.</td>
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<tr>
<td>Administer a closing survey to each volunteer coach to help determine what worked/what didn’t.</td>
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<td></td>
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<tr>
<td>Administer a closing survey to each client, as well as to the partner organization.</td>
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*Adapted from a resource provided by ICF Metro DC.*
COACHING AGREEMENT

The Coaching Relationship

A coaching relationship can be a powerful experience, involving the development of new possibilities, new levels of achievement and personal growth. The coaching relationship between the coach and the client is founded upon mutual trust and respect. The central focus of the coaching relationship is the well-being of the client.

Fundamental to a successful coaching experience is learning. The coach supports the client in reaching the desired outcome of the client. The coach supports the client in exploring new ways to view situations, individuals, possibilities, and in developing new approaches, plans, strategies and actions. This innovation involves learning. At times, the learning may be challenging. There may be times when the learning involves new discoveries about the way an individual’s own actions play a part in situations the individual wishes to change. This type of self-discovery can at times be uncomfortable.

We hold all coaching conversations as confidential, and will not voluntarily divulge information about a coaching relationship without the written or verbal permission of the client. We follow the International Coach Federation (ICF) Code of Ethics.

The Coaching Arrangement

This agreement between [COACH] and [CLIENT] begins [DATE] for a total of [NUMBER OF HOURS] hours of coaching. All coaching should be completed within [NUMBER OF MONTHS] months of the start date unless otherwise agreed upon. The coach and the client will decide on the length of the sessions and the total duration of the coaching relationship. The sessions will be conducted via [MEDIUM] at pre-scheduled times, unless otherwise agreed upon by both parties. Sessions may be supplemented by emails as needed until the final session is complete. This coaching package is being offered to [CLIENT] as a one-time, pro bono offer. Should the client choose to continue the coaching relationship with the coach, it is a private matter between both parties and it is not covered under this agreement.

The Coaching Agreement

I understand that coaching is not therapy nor is the coach qualified to give legal or financial advice. I take full responsibility for all actions I take as a result of coaching and neither [CHAPTER] nor [COACH] can be held responsible for any action taken or not taken as a result of coaching. I also agree to the following:

- I agree to be fully present and on time for all coaching conversations.
- I realize that I am completely responsible for my own growth and learning.
- I realize that there may be times in the coaching process where I may confront realizations that may be uncomfortable.
- I realize I need not discuss anything I am not comfortable discussing.
- I realize that I am responsible for my own actions and inactions.
- I realize that my coaching relationship is a resource, and that it is up to me to fully utilize this resource.
- I agree to communicate any concerns I have about the nature of my coaching relationship, my experience of the coaching relationship or any particular interactions with the coach.
- I agree to give at least 24 hours notice if I need to change or cancel a session.

I, [CLIENT], understand our commitment and agree to be accountable in our coaching relationship.

___________________________________
Client Signature

Adapted from a resource provided by ICF Metro DC.
Coaching Evaluation Form

Thank you for taking the time to share about your experience of our coaching conversations. Here are a few statements below to focus your reflections:

*Please share specifics in completing these statements:*

1. The coaching was valuable to me because ...

2. The duration of the sessions and the overall coaching process was sufficient to meet my needs.

3. The coaching experience *met my expectations* when ...

4. The coaching experience *did not meet* my expectations when ...

5. The coaching experience *exceeded* my expectations when ...

6. In working with other clients in the future, I suggest that ...

7. I would recommend [COACH’S NAME] because ...

8. I also think it is important to share that ...

9. On a scale of 1–10, I rate the overall experience in working with [COACH’S NAME] as a ______.*

*1 = did not meet my expectations, 10 = exceeded my expectations*
COACHING QUESTIONNAIRE

Contact Information
Name:
Email Address:
Telephone (W):
Telephone (M):
Job Title:

Organizational Information
Organization Name:
Office Address:
Website:

Coaching Goals
What are your top goals for the coaching engagement? (check no more than three)
Improved work performance ___
Increased self-esteem/self-confidence ___
Improved work/life balance ___
Enhanced career opportunities ___
Improved communication skills ___
Relationship building ___
Team effectiveness ___
Other ____ Please identify: ___________________________________________

Please elaborate on your goals for coaching:

In your professional life, what do you hope to accomplish through coaching?

In your personal life, what do you hope to accomplish through coaching?

What are the challenges, limitations, and obstacles that hold you back from accomplishing your goals?
What strengths, assets, capabilities and support do you desire in a coach?

What characteristics would your ideal coach have?

Gender: M ___ F ___ No preference ___

Coaching style:

Professional experience:

Is there anything else you’d like to share?
CLIENT WORKSHEET #1

PEAK EXPERIENCE EXERCISE
Reconnect with your essence by discovering your top values

Values are those intangible, inner forces that are your unique essence. They make you, you. (Sample values are listed on the next page.) If someone took them away, it would feel like a violation of who you are. When you live in honor of your values, you are more likely to feel satisfied and empowered. Honoring values puts you at your best.

HOW
Describe a moment in time when:
• You felt fully alive and connected to life.
• It seemed time stood still, and you felt thoroughly engaged.
• You were awash in a feeling of deep knowing that “This is how it is meant to be.”
• You thought, “This is what I am meant to do.”

Relive the moment in full color and surround sound. Put yourself back in that moment as you answer:
• What was happening?
• What were you doing?
• Who else was there?
• Describe the physical surroundings: sights, sounds, smells, tastes, and textures.
• What physical sensations did you experience?

Record key elements in the story. Follow the enthusiasm and energy. This is fun to do with someone else, taking turns sharing your special moments.

After you tell the story, go back thought the important elements and identify the top three to five values that emerged.

REFLECT
• What did you learn about yourself? How can you honor this more in your life?
• How can you use this information to validate or make different decisions?
• How might life be different if you made your next decision from one of these important values?
• What physical sensations did you experience?
• What can you stop doing in your life that does not honor who you really are?

TRY THIS
This week or next, commit to honoring one or more of these values to help guide you in making a decision.
• What will make this most likely to happen?
• What accountability do you need?
VALUES LIST

This is not a complete list of values. Use the following values or use your own.

Humor
Partnership
Service
Participation
Collaboration
Contribution
Excellence
Free spirit
Focus
Romance
Recognition/Acknowledgement
Harmony
Accomplishments
Orderliness
Forward the action
Honesty
Success
Accuracy
Adventure
Lack of pretense
Zest
Directness
Productivity
Personal power
Performance
Community
Freedom to choose
Connections
Comradeship
Lightness
Spirituality
Empowerment
Full self-expression
Fun
Integrity
Creativity
Independence
Nurturing
Joy
Beauty
Authenticity
Tradition
To be known
Growth
Aesthetics
Risk taking
Peace
Elegance
Vitality
Trust
Solitude
Health/Well-being

Adapted from a resource provided by ICF New England.
Intimacy
Learning
Loyalty
Moderation
Sensuality
Leadership
Environment
Discovery
Play

Adapted from a resource provided by ICF New England.
CLIENT WORKSHEET #2

LIFE AND ENERGY WHEEL
Discover what’s important and where your energy is really going.

The Life and Energy Wheel is a visual tool representing your life, goals or a designated project. It can be a display for any aspect of your life that you choose: home, work, leadership path, management skills or whatever you need.

The Life and Energy Wheel is a visual method for seeing the entire spectrum of issues, then rating your satisfaction with these issues. In addition, the wheel provides insight into your current focus of time and attention in comparison to where you would like to focus your time and attention.

HOW (See next page for a sample wheel and areas of importance.)
- List eight areas of considerable importance or value to your life.
- Place each word from the list into a wedge on the wheel.
- Regard the center of the wheel as zero and the outer edge as ten. Rank your current level of satisfaction by placing a dot to represent the appropriate ranking.
- Draw a line from dot to dot until you have gone all the way around the wheel.
- Go back to each wedge and rate the level of energy you are currently directing toward that area using a scale of 1 to 10: 1 being the lowest level of energy, 10 being the highest. A different color pen may help.

REFLECT
- The big picture: What do you notice?
- In what areas are you at a high level of satisfaction? Mid-level? Low level?
- What contributes to those ratings?
- Now look at where you are expending your time and energy. How do the ratings of this compare with your satisfaction level?
- Does your energy expenditure match what is important to you?

TRY THIS
- What action would make your satisfaction level a 10, or at least increase your satisfaction level in desired areas?
- What would you like to direct more energy and focus toward?
- What needs less of your energy?
- What action would that require?
- What do you need to make this happen? What accountability do you need?
# Sample Areas of Great Importance

<table>
<thead>
<tr>
<th>LIFE</th>
<th>JOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career</td>
<td>Time management</td>
</tr>
<tr>
<td>Finances</td>
<td>Organization</td>
</tr>
<tr>
<td>Significant other</td>
<td>Manage email/voicemail</td>
</tr>
<tr>
<td>Family/friends</td>
<td>Team participation</td>
</tr>
<tr>
<td>Environment</td>
<td>Clarity regarding my role/duties</td>
</tr>
<tr>
<td>Personal growth</td>
<td>Relationship with colleagues/clients</td>
</tr>
<tr>
<td>Health</td>
<td>Timeliness regarding duties/projects</td>
</tr>
<tr>
<td>Fun and recreation</td>
<td>Satisfaction with job performance</td>
</tr>
</tbody>
</table>

Adapted from a resource provided by ICF New England.
MIND MAP
Declutter your mind and set it free to think and create.

Mind maps are a graphic depiction or diagram of everything that is being held in your brain. The mind map can be used as a non-linear "to-do" list, a mind de-cluttering tool ("brain dump"), or a big picture planning tool.

HOW
- Think about a task, project, dream or day-to-day challenge that is daunting, and may be able to be streamlined and simplified in order for you to be more purposeful and efficient.
- Choose a central idea, challenge, desire or goal, and put it in the center circle of the map. The center circle is like the sun with the planets circling it.
- All other circles flow from this, and each of these will contain a different component of the task in the center circle.

REFLECT
- How can I use my mind map to be more organized and focused?
- How can I use my mind map to have a to-do list that matches my needs in the moment?
- How might this affect my next move?
- What did I learn at the conference that needs to be on this map?

TRY THIS
Continue to add to your mind map this week so it remains current and complete.

- Notice what it is like to be able to see a graphic display of what was swirling around in your head.
- Take an action based on a new discovery from the map process.
- Are there other areas in your life that would benefit from using this tool? If so, try it out.
- What will make trying it out most likely to happen? What accountability do you need?
CLIENT WORKSHEET #4

REFRAMING
Manage your thoughts and emotions for a desired outcome.

Re-framing is a tool for discovering and choosing new perspectives about any situation. It’s a way to break through preconceived notions and beliefs as one explores options. Exploring various perspectives often provides a sense of renewed possibility.

HOW
Use the Perspectives Wheel. (See the next page for a sample wheel.)

• Think of a challenge or decision you are facing. Name and label the perspective wheel with your challenge.
• Label one wedge of the wheel with this perspective. Make brief notes in the wedge that capture this perspective.
• Generate other possible perspectives as you move around the wheel, labeling each wedge with each new perspective. Make notes here, too.
• Now go deeper into exploring three of these perspectives.
• Choose a perspective from the wheel that can best help you manage your thoughts and emotions to bring about the outcome you desire.

REFLECT
• What is possible from this new perspective?
• What would you be saying yes or no to?
• What feels easy? What’s your gut feeling?
• What perspective holds the most possibility for you? What gets you closer to your objective?
• Notice your energy and enthusiasm when exploring the different perspectives.

TRY THIS
• Is this the perspective that most meets your needs and desires?
• Practice sensing/feeling what it is like to live from this perspective; notice what comes up for you.
• How can you hold onto this new perspective?
• What will make this most likely to happen? What accountability do you need?
COMMUNITY COACHING OUTREACH (CCO) COMMITTEE REQUIREMENTS

**Needed:** A few great coaches to join the steering committee for our Community Coaching Outreach (CCO) Initiative

CCO committee members will help to create a plan for an effective volunteer coaching structure and process in order to execute the CCO initiative objectives.

CCO committee members will also support the overseeing of the engagement and activities of the volunteer coaches to ensure goals are met, and risks are mitigated.

CCO committee members will provide energy, skills, and insights to

- Establish relationships in the community to communicate our initiative objectives
- Develop a plan of action for the pilot program
- Manage the process from orientation to evaluation
- Support and lead kick-off events and information sessions
- Conduct follow-up activities with participants and board
- Serve as spokesperson
- Provide on-going support for participating coaches
- Explore local opportunities
- Work in conjunction with communications board member
- Develop and refine materials and roles as appropriate for the success of the initiative
- Accompanying board member on calls

**Characteristics for Successful CCO committee member:**

- Leadership ability and knowledge about ICF and coaching profession
- Ability to commit the time required by the role (3 hours/month)
- Good communication and interpersonal skills
- Demonstrated ability to work as a team member
- Adherence to ICF ethical standards
- Ability to support majority decisions
- Ability to understand the impact of issues on the profession as a whole
- Passion for reaching back and into the community
- Working understanding of project and risks
- Enjoys leading people and respects others' views and talents
- Ability to facilitate discussions well
- Can commit to 1 year term
- Takes responsibility and follow through
- Represents the organization positively

*Adapted from a resource provided by ICF Raleigh.*
# COMMUNITY COACHING OUTREACH (CCO) COMMITTEE
## ROLES & RESPONSIBILITIES

<table>
<thead>
<tr>
<th></th>
<th>Committee Chair</th>
<th>Client Liaison</th>
<th>Chapter Coach Liaison</th>
<th>Coach Liaison</th>
<th>Admin Support</th>
<th>Evaluation Manager/ Liaison</th>
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</thead>
<tbody>
<tr>
<td>Communication about the program in general</td>
<td></td>
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<tr>
<td>Communication about client applications and assignments</td>
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<tr>
<td>Managing coach applications, checking references, getting agreements, entering profiles on the tracking sheet</td>
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<tr>
<td>Assigning coaches and keeping track of assignments, completion and availability</td>
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<tr>
<td>Communicating with clients about coaching readiness, coach assignments, sending/receiving evaluations, entering data on tracking sheet</td>
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<tr>
<td>Process, form, communication design and development</td>
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