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## **CASE STUDY – TOWARD A COACHING CULTURE IN AN AUSTRALIAN PUBLIC SECTOR AGENCY (September – December 2016)**

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### **Abstract**

This study details coaching products based on key frameworks from adaptive learning theory (particularly as articulated by Kegan and Lahey at the Harvard Graduate School of Education in various publications) and then applied to an Australian Government Agency. It assumes familiarity with the Immunity to Change map (see discussed for example at Kegan and Lahey's business site <http://mindsatwork.com/>) will be of interest to coaches, researchers, human resource professionals, senior leaders with an interest in culture change in the middle of an organisation.

### **Keywords**

Immunity to Change, Deliberately Developmental Organisation, adaptive learning, peer coaching, organisational culture **Questions beneath the Case Study:**

- Can challenging developmental coaching work be carried out in the middle layer (team leader and executive) of an Australian Public Sector agency as a way of influencing organisational culture?
- Can the Immunity to Change method (Kegan & Lahey, 2009) be adapted into a peer to peer coaching format which gradually transfers responsibility for sustaining a culture of adaptive learning into the peer group?
- If a peer to peer coaching culture is successfully created using the peer to peer group coaching format, does it transfer into the teams of participants?

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## **The organisational context**

[Agency] approached me in mid-2016 to run a pilot of two coaching circles for middle managers. Its main concern was to get more women promoted into senior management, and to deal with the high levels of disengagement in the agency that had been recorded in the annual APS (Australian Public Service) census. The wider context is a push to promote more women into senior roles in the public and private sector, and a 'Women in STEM/ICT' push in agencies with a technical focus, and an appetite in the agency for innovation.

## **The coaching format**

### **Peer-to-peer coaching circles**

Increasingly, organisational performance (e.g. innovation, responsiveness to disruption, diversity and inclusion, psychological safety) is linked to organisational culture. With this in mind, I had pitched the idea of coaching circles to a group of learning and development professionals a month or two earlier, and that meeting had followed on an unsolicited proposal I had sent in to the agency almost six months earlier. The aims of the coaching circles were to create a peer learning community for middle managers, to teach coaching skills to participants, and then for participants to take those tools back to their teams to create a 'coaching culture' in their teams. (The longer term impacts of the Circles should include reduced attrition rates for women in middle management and hence the consolidation of a pool of promotion-ready and well-networked women into senior management, though for this to be the case a critical portion – anecdotally 30% of middle managers – would need to go through a program such as this.)

The form in which I delivered the two Circles was almost identical to the original proposal: 6 – 8 people, seven 90-minute sessions, with the exception that session two would be delivered as a three-hour workshop using Kegan and Lahey's Immunity to Change (ITC) process.

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## Coaching topics

As a part of the application process, participants were asked to identify current learning 'edges' by asking their colleagues 'What is the one big thing I am currently doing that gets in my way at work?'

The ITC process also allows participants to self-design a coaching program to work on that edge. In the peer coaching approach this work happens in dialogue with the rest of the Circle.

The agency offered the Circles to early/mid-career professionals (APS6/EL1) supervising small teams. All work to quotas and remuneration is linked to bonuses: this made gains from coaching easy to quantify anecdotally via participant narratives in the coaching group. No formal organisational evaluation of the link between the coaching and participant productivity was carried out.

I reviewed the shortlist of applicants and made no adjustments.

Participants selected for the program also signed a coaching agreement listing their responsibilities in the circle to their peers, to me as the coach, and to themselves, and again asking them to record any relevant psychological treatment that they were currently engaging in.

Psychological safety is one of the most influential factors in team performance (Delizonna, D (August 2017). High-Performing Teams Need Psychological Safety. Here's How to Create It. Harvard Business Review) and in the success of individual and group coaching. In creating a psychologically safe group, where members feel able to disclose information that feels 'risky' to them, I aim to model how to create psychological safety in their own teams, particularly through normalising vulnerable disclosures. For that reason, **Preparation for the Circle** included a requirement that each participant watch a 20-minute online talk about Shame (Brown, B (2012). Listening to Shame [https://www.ted.com/talks/brene\\_brown\\_listening\\_to\\_shame](https://www.ted.com/talks/brene_brown_listening_to_shame) [accessed 17/04/2018]. Vulnerability, or the internal feeling of being undefended, is both a cause and an effect of psychological safety in a group discussion.

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## **In Session I**

Participants share the coaching topics (or ITC 'edges' as identified through the application process), and I begin the process of modelling peer coaching (reflective listening, powerful questions) rather than advice-giving. My interventions in the first sessions are extensive and the work is tightly held, though by the end of the program I aim to be out of the room most of the time. Participants find Session I very challenging though most also report a high sense of reward and safety, and tears are common. I also teach an emotional processing tool ('the Sedona Method'<sup>1</sup> described at <sup>1</sup> <https://www.sedona.com/What-Is-The-Sedona-Method.asp> [accessed 17/04/2018]) in Session I.

## **Session II is run as an Immunity to Change process, which takes three hours.**

In this workshop, participants arrive having consulted three people (including a family member) about their 'One Big Thing', or the habit that trips them up at work or at home. Commonly, people receive the same feedback from multiple sources. While they often didn't know about their One Big Thing prior, they learn that everybody else already knows this about them - so they tend to arrive at the workshop feeling vulnerable and unsure about what to expect.

The ITC workshop takes them through a process of identifying what they need to do to get progress on a goal that falls out of their 'One Big Thing' – e.g. if their habit is to talk too much, their goal may be to learn to reflect before speaking and speak less in meetings.

The next step (column two in the process) is to identify what they are currently doing that undermines that goal (e.g. always being the first to talk in a meeting); and then (in column three) to let themselves feel what is the worry or emotion underneath a 'worst thing that could happen' scenario where they actually sit back and listen instead of habitually talking.

At this point, the self-protective part that holds the habit in place emerges, and people see their 'Immunity to Change' – if they did start to act on their goal, they would have to experience the difficult emotion they usually avoid by initiating the habit (e.g. talking too much). People see on the page in front of them why they can't get traction on their developmental goals, and very often they are quite confronted by this insight.

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The final part of the process is to identify assumptions ('If I don't come across as an expert, no one will think I have any value to the team') that come from their commitment to not feeling the emotion or worry, and to design tests of those assumptions to carry out in the peer circle and then later in their teams.

Participants find this very challenging, and most end the session not really understanding the process. I tell them to expect this, to prepare for the 'burn' of adaptive learning and assure them that ITC is just a fancy way of getting them into a habit of adaptive learning from multiple angles. I also tell them they won't really 'get' the map until they've run through it a few times. Sending participants into the map with low expectations really helps them participate, and this also applies when designing tests of column-four assumptions.

### **Session III introduces peer coaching formally**

I put people in pairs to coach each other to design tests of their ITC assumptions. Critical here has been the idea that tests should be small and low-key. High performers will typically set themselves challenges that are right at the edge of their competence, which does not always support their success in the coaching program. Given the high level of challenge involved in their participation in the Circle, I keep the ITC work as low key as I can and stress the value of incremental and modest change. In reality, these 'modest' tests often yield extraordinary results in the sense of radically undermining assumptions that emerge from column three counter-commitments.

By way of example, a woman middle manager who looked much younger than her actual age, and who came from a traditional South-East Asian family, tested two assumptions about speaking up in a group.

The two assumptions she was working with were 'Women should not speak up because leadership is different from service, and women are not feminine if they are not serving' (she discovered it was possible to speak up from a sense of service, and still feel 'feminine' within her own cultural frame') and 'If I speak up no-one will hear me'.

She tested the assumptions by simply asking a question (prepared prior with her coaching pair) at an all-staff meeting (the group size was about 50 people). The question, 'should we focus on problem solving, or do we prefer to use this time for hearing all views?' was picked up by her senior manager during the meeting and she later described this as 'empowering and liberating'.

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## **Session IV continues the work of designing tests...**

...with the additional challenge that the test must involve request-making mid-Cycle of someone in their team using a formula in a hand-out that I provide.

I am working here to grow the agency of each participant and to give them an experience of experimentation in an atmosphere of accountability to the peer coaching circle. This request-making supports their capability to give effective feedback, set boundaries, and show up more assertively at work. It also gives them an experience of themselves as assertive communicators who still 'get to be me' while asking for what they want. This latter experience is particularly important for women and for people from minority communities (including non-native speakers of English).

## **Session V – the group begins to self-moderate**

Having made mid-cycle experiments with request-making, participants return to the Circle with their experiences. We discuss these in the Circle format using peer coaching tools. By Session V I am intervening much less and often in Session V I find that I spontaneously push my chair back from the table and sit back, signalling that my role as 'leader' is over. I continue to 'hold' the space but my interventions become less frequent. By Session V participants have begun to 'get' what coaching is, and their confidence in their ability to coach themselves and others has begun to rise as they begin to get into habits of experiment making and reporting back, and begin to experience the Circle as trustworthy, expert, and supportive.

## **Session VI has a specific focus on creating a coaching culture in each participant's team**

By now, most participants will have been spontaneously engaging in coaching their colleagues, and some will have set up informal agreements with peers outside the Circle to coach them.

I used the terminology of the 'Deliberately Developmental Organisation'): of creating routines to 'surface' learning edges; and the importance of establishing a 'Home, or learning community at work. See Kegan & Lahey 'An Everyone Culture: Becoming a Deliberately Developmental Organisation' Harvard Business Review Press (2016), also summarised in my review of the book at <http://www.canberratimes.com.au/national/public-service/book-review-an-everyone-culture-where-the-purpose-of-work-is-selfgrowth-20161030-gse174.html>

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## **Session VII is designed to sustain the work: where does the Circle go from here**

I ask participants to design a group program to consolidate the peer coaching work and community in the coming year, and I provide a hand-out of protocols to support that work. Although I find this difficult, I am out of the room for most of this session, though I check in periodically. We close with statements of appreciation and commitment. I follow up a month or two later with a 'Post-PCC Protocol' – this is a list of suggestions (also framed using the DDO language) for keeping their learning community alive and engaged in the ongoing work of their own development. The protocol includes options for working with an external coach, although the protocol is designed to support their independence without further external support.

## **Summary and Conclusions**

To restate the first two questions beneath the case study:

- Can challenging developmental coaching work be carried out in the middle of an Australian Public Sector agency?
- Can Kegan and Lahey's Immunity to Change method be adapted into a peer to peer coaching format which gradually transfers responsibility for learning into the peer group?

The answer to both questions is yes: the feedback from participants and the sponsoring organisation was exceptionally good in terms of visible changes in the leadership style and effectiveness of participants.

Below are learnings and observations on how to maximise the impact of the work. I deal with the final question at the conclusion of the paper.

## **Group format influences attendance and participation**

This pilot confirmed my experience that six or seven sessions is about right to complete a curriculum that works with assumptions and mindsets (i.e. catalyses adaptive learning in participants), that ninety minutes is long enough per session, and that more than eight participants tends to impact on participation levels: people feel less visible and therefore less accountable.



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## **The internal counterpart is critical, and that counterpart should understand and champion the developmental work to the rest of the agency**

In this pilot, my counterpart was an internal coach. We debriefed extensively in relation to the group work, and in relation to the progress of individuals in the Circle. My trust in her judgment, and our shared understanding of coaching ethics and confidentiality, made our collaboration both rewarding and supportive of the work in the Circle and then participants' teams.

This was a critical factor in the success of the pilot in my view and should be seen as best practice.

## **Sponsorship of the work at senior level supports attendance and participation**

Both Circles in the pilot were sponsored by a senior executive who was also the sponsor of the agency's Women's Network. Participants sometimes experience multiple demands on their time, including for other training. I was able to leverage that sponsorship to insist that the peer coaching work took priority over other training, given the interdependent nature of the learning environment. Senior sponsorship also diminishes the risk for middle managers. I also see senior sponsors as partners in growing agency understanding over time of a developmental learning approach.

## **Building a culture of accountability supports developmental learning**

I prime participants to persist with the work through change resistance and other demands on their time: 'everyone attends every session, and on time.' I transfer accountability for these commitments to the group over time and have got better at this – I was too desirous of approval in the first few Circles I ran and had trouble taking stands for the culture of the group.

Using punctuality as the topic for accountability conversations is extremely useful – particularly if I run late at any point, which happened twice in this pilot (I then invited others to take a stand with me about my own punctuality – some of the most challenging and, from my perspective, effective interactions in the series. The group work is most effective when I am also showing up as vulnerable and open to learning because it models for participants a style of leadership that will support the creation of a coaching culture in their own teams)

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## **The Immunity to Change format can be adopted even in conservative organisational environments such as a public sector agency, provided the coach can ‘hold’ the challenge and the developmental work**

In this pilot I put a strong focus on the ITC method, and carried it through all sessions and in the ‘homework’ I set between each session (‘mid-Cycle’). Participants engaged with gusto. I know of no other format that deepens coaching work so quickly and surgically as the ITC method and prompts people to engage so directly with what their colleagues think of their performance.

## **Participants need to be screened for coaching ripeness**

Ripeness for coaching (capacity to introspect and act on observations) and fitness for coaching (adequate mental health) are required for successful participation in the PCC.

We assessed both in a fairly general way through the design of the application form, by asking people to identify a coaching topic (ITC ‘edge’) in consultation with their colleagues as a condition of applying to participate in the program; and asking them to rate their own willingness to engage with their topics and support others to do the same. A careful screening process doesn’t insulate the group from the risk that the charge in the group coaching work may become higher than is useful or psychologically safe for all participants. Participants cannot always accurately assess in advance their capacity to introspect and act on observations or how authentically they can commit to working with a group of peers in a sustained way. Nor are they always aware of latent trauma that may surface in the coaching environment.

## **Individual coaching alongside the group work deepens the work and assures safety for participants and the organisation**

I offer individual coaching where I am concerned about a participant’s level of charge (if it seems too high to me), where I suspect that a participant may have disclosed in the safety of the room (and then later regret having shared) stories or events from their history that are unresolved, or where I observe that a participant has a particularly high appetite and aptitude for self-reflection or behavioural experiments with their teams outside the Circle.

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## **Advanced coaching work should be trauma-informed to ensure the safety of the client and to manage risk to the organisation**

While psychological safety is the pre-condition for coaching work, it is also the condition in which unhealed trauma (most people have this) can begin to surface. In conversation with my Learning and Development counterpart, 'Elinder', I referred one person in each Circle (so 2 out of 12 participants in this pilot) to a therapist, and both continued safely in the Circle. Their participation and engagement continued to be high and I read up on developmental trauma and PTSD in order to understand better how to support high performers with trauma.

The model that psychology brings people to function, and coaching brings them to high performance, doesn't match my experience that high performers are often driven by adaptation to trauma: they over-achieve to cope with trauma, not in spite of it.

I now offer individual coaching alongside the group work. While I consider that a minimum of two sessions (alongside a series of seven group sessions) is best practice, this will depend on an organisation's willingness to fund the individual coaching, as well as the needs of each particular participant.

The final question is as follows:

## **'If a peer to peer coaching culture is successfully created using the peer to peer group coaching format, does it transfer into the teams of participants?'**

The answer to this question is 'yes': to the extent that a participant in the peer to peer coaching circle fully engages with mid-cycle tasks designed to help them create a coaching culture in their own teams). As a group, participants reported success in this, and the use of pairs made the completion of mid-cycle work much more likely. Assessment of longer term impacts in the culture of participant teams would require an evaluation and potentially consolidation of the work through a low-intensity ongoing development program for graduates of the peer to peer coaching circle.

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## ABOUT THE AUTHOR

Jacqueline Jago BA/LLB LLM ACC is an Australian executive coach specialising in organisational culture change which links individual, team, group and organisational development. This article also exists in a full-length version which discusses coaching with issues of gender and race in both of the peer coaching groups discussed here. For comments or further discussion, or for a copy of the full-length version (which includes feedback from group participants and the sponsoring organisation), please contact her at [jacqueline@bloom.guru](mailto:jacqueline@bloom.guru) or via LinkedIn.