

LATE CAREER COACHING PROGRAM

A Faculty Development Program from the Utah Coaching and Advancement Network (U- CAN) at University of Utah Health

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HEALTH
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THE LATE CAREER COACHING (LCC) PROGRAM

The Health Sciences Office for Faculty and Utah Coaching Advancement Network (U-CAN) have sponsored and organized the Late-Career Coaching program annualy since 2023. The Program provides coaching to University of Utah Health faculty in the later phases of their career to design these stages of their career meaningfully.

The LCC program uses a coaching model to help faculty develop clarity around the later phases of their academic career. It aims to provide these faculty the opportunity to design and navigate this stage of their career creatively and meaningfully.

PROGRAM OBJECTIVES:

1. Develop clarity and intention on what makes for a personally meaningful late career and retirement.
2. Promote continued development of one's identity inside and outside the career, aligned with life/ career stage.
3. Consider and develop a strategy for navigating late career transitions.
4. Facilitate confidence, preparation and action toward implementing transitions.

COACHING CONVERSATIONS

During the LCC initial engagement coaches and clients discuss the first three topics below to understand the context of the coaching engagement. Thereafter, the coaching dyad (coach and client) will select 3 topics from topics 4 to 10 to discuss in subsequent meetings.

1. Clarifying values and objectives 2. Understanding one's career / life stage & Identity 3. Developing options and pathways	**Core of the initial engagement**
4. What activities to maintain and shed 5. Career goals and career legacy 6. Developing interests and priorities outside the career 7. Considerations of financial security	**Identity & preparing for transitions**
8. Coordination with partner and family 9. Succession planning 10. Negotiating for a new work arrangement	**Implementing late career transitions**



1. CLARIFYING VALUES AND OBJECTIVES

The coaching engagement begins with the coach and the client introducing themselves to each other. They do this through telling their life/career story. This is to develop a deeper understanding of one another and to build trust within the relationship. See Appendix B for a guide to the story structure.

The story of the client

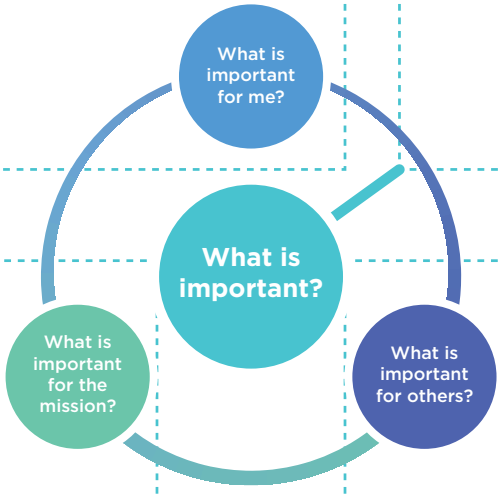


The story of the coach

Values. After initial introductions, the client shares their values relative to their late career. The values will answer questions about "what is important" relative to oneself, relationships that are important to the client, and the mission of the team or organization.

(Self)

What is important as a combination of all three?



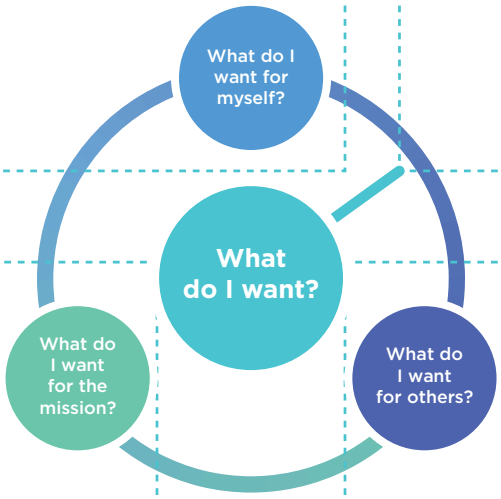
(Organization Mission)

(Relationships)

Objectives. After relating values, the coach and client explore the objectives of the coaching engagement. Remember that the coaching engagement focuses on the actions of the client and what is within the control and influence of the client. The objectives will answer the question about "what do I want" relative to oneself, relationships that are important to the client, and the organizational mission.

(Self)

What is important as a combination of all three?



(Organization Mission)

(Relationships)



2. UNDERSTANDING ONE'S LIFE/CAREER STAGE

Once the coaching values and objectives have been defined the coaching dyad discuss the client's life and career transition stage. The conversation focuses on the role of the career relative to life. Does the client want to stay engaged professionally, or do they want to transition to different activities?

Life Stage. Consider the following prompts:

- What stage of life am I at?
- How many more years do I want to stay engaged professionally?
- What does engagement or disengagement look like over the next 10 years?
- Are there other activities that will replace my current set of activities?

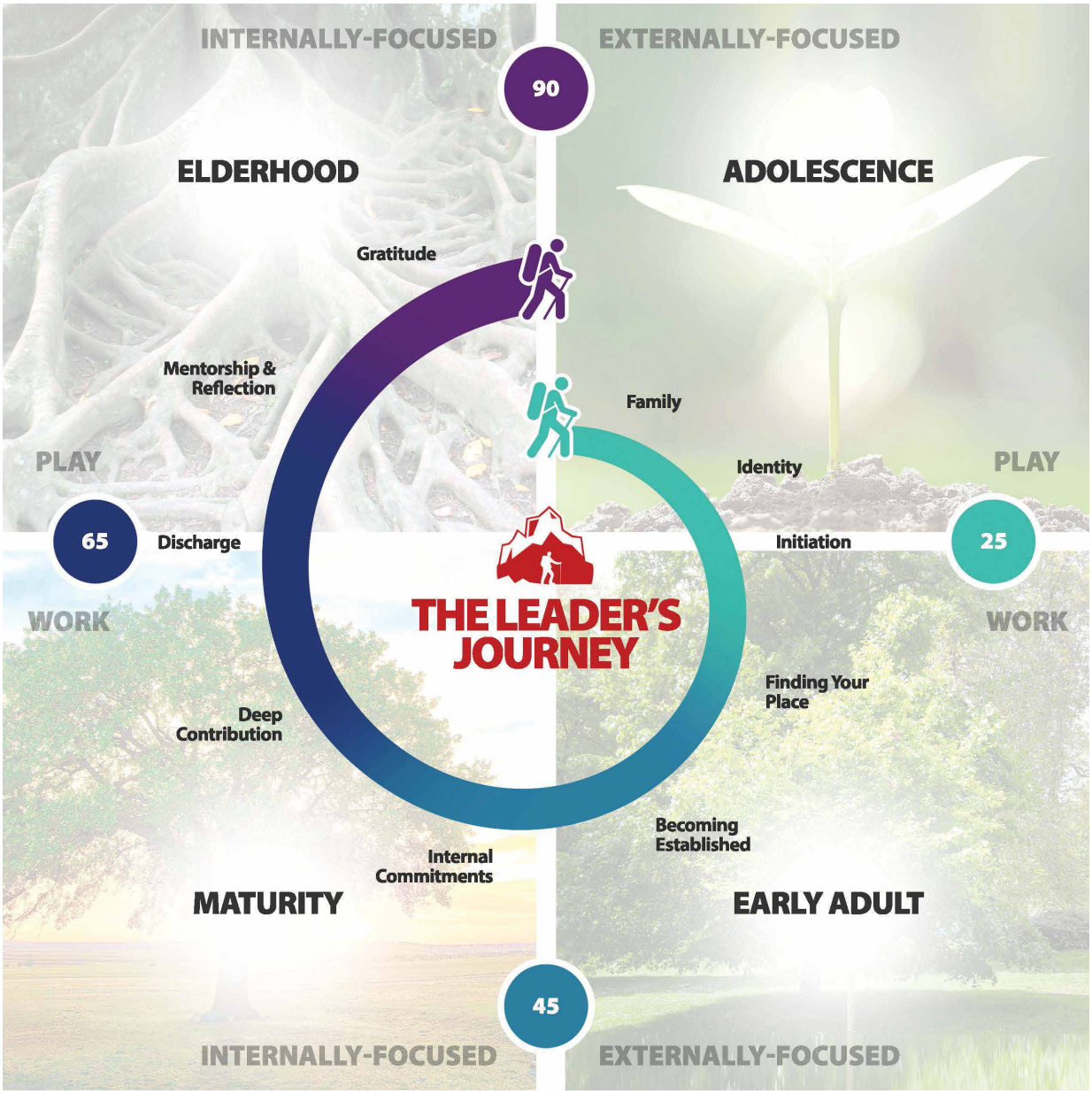


Figure 1.1

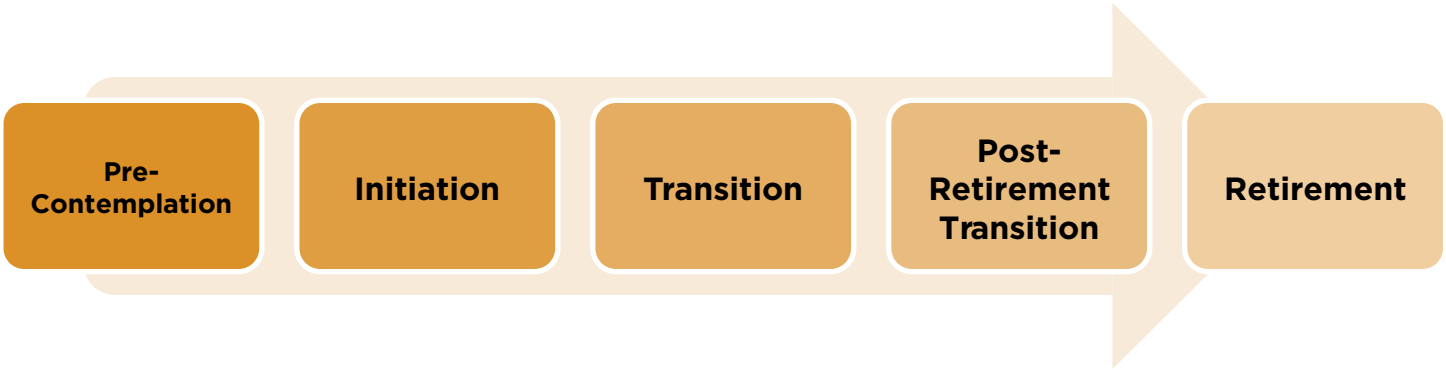
Based on the insights from the life stage discussion, the client may have a preferred time horizon for the career transition. This transition could be several years away, or it could be imminent. The coaching dyad will then discuss the stage of the career transition that the client sees themselves as being at.

Transition Stage. Consider the following prompts:

- Am I in the career transition process?

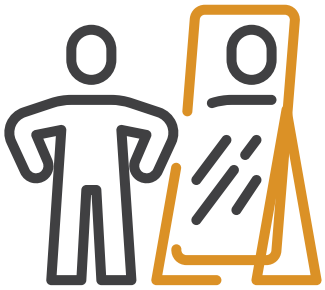
- What stage am I at?

- How long do I anticipate the process to take?





During transitions, one's identity goes through a process of change. One's career and professional identity diminishes as one's personal identity re-emerges. As a result of the transition, how does one's self-perception change? The coaching dyad will discuss the client's emerging identity outside the career.



Identity. Consider the following prompts:

Who am I outside of my career?

What are my most important roles and relationships

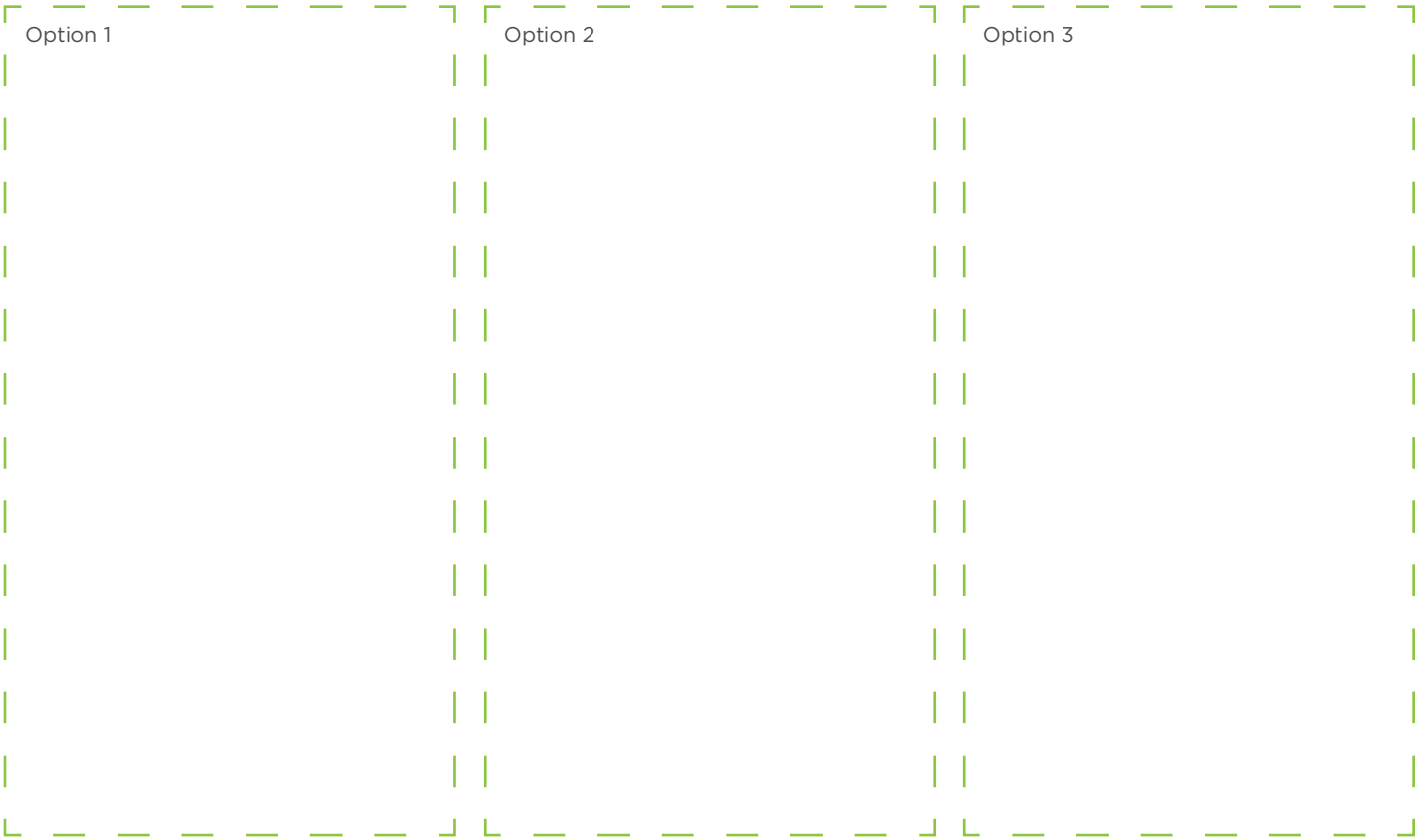
What are my core values and beliefs?

What are my favorite talents and interests

3. DEVELOPING OPTIONS AND PATHWAYS

At this point, the coaching dyad has discussed the relevant context for the coaching engagement. The coach will prompt the client to develop and share what they see as their main decisions and options. The client does not need to make any decisions at this point, but they should identify the key decisions coaching will help address and the key options available.

Options: Identify 2 to 3 main options/scenarios that the client is most seriously considering.



a. What comes to mind and what are you considering in prioritizing these 2-3 main options over others.

b. What do your prioritized options offer that others might not?

c. Imagine how each option might lead you to unique experiences and opportunities. Explore what your future self might experience if you took each path.

d. Consider how other important people might be influenced your choices and outcomes.

Choices. Discuss the prompt:

What is the most important choice that is facing me now?

a. What is it about this choice that makes it most important for you right now?

b. How will this choice affect your path over the next 3-5 years?

c. What other choices will influence or be influenced by this one important decision?

After discussing options and choices, the coaching dyad should decide what follow-up conversations from Sections 4 to 10 would be useful and schedule the next coaching session.

4. WHAT ACTIVITIES TO MAINTAIN AND SHED

Envisioning yourself in retirement might involve a day when you no longer have to take call or meet another grant deadline or attend another committee meeting. It might also involve having enough time to dedicate yourself to a project you are passionate about. Thoughtful consideration of how you want your professional and personal life to be after retirement is a worthwhile exercise.

As you look at your present professional life consider using the filter of how your various roles make you feel. Some of them may result in a feeling of satisfaction or joy. Others may leave you flat. Still others have been leaving you feeling drained and frustrated for a long time.

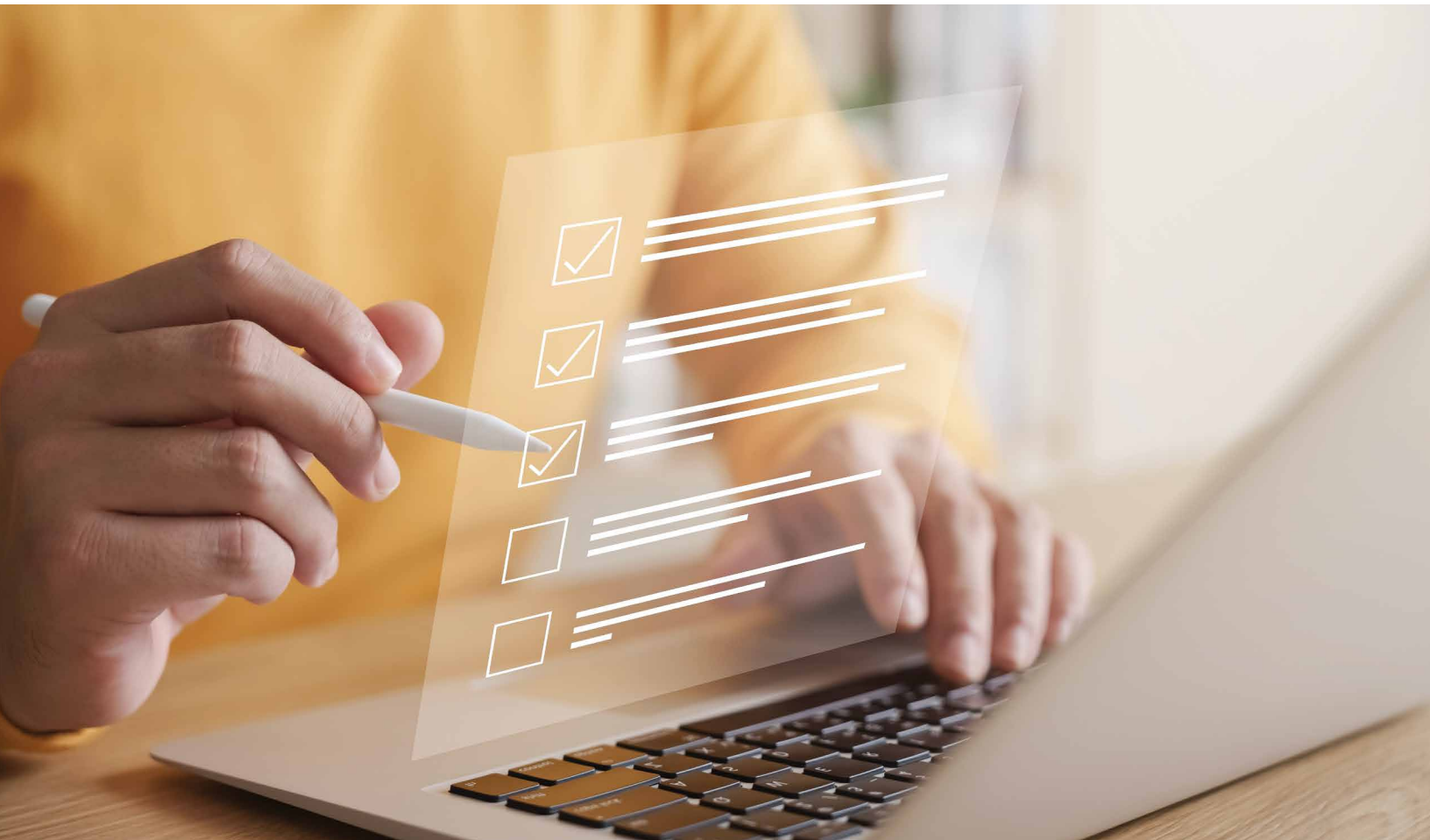
Pre-Work
Reflect on the following prompts prior to the coaching session:

- What career roles do you currently have that you have a passion for?

1. Are you called to continue any of these roles in some way leading up to and after retirement?

2. What roles do you currently have that you would not miss at all if you were relieved of them?

3. How long of a transition period is needed to change your roles?



During the Coaching Session
The following format is suggested for this session discussing activities to maintain and to shed and how it fits into a retirement plan.

- 5 min - recap and updates from previous sessions
- 5 min - client relates their reflections from the pre-work
  40 min – Coaching Session Body
  - Examples of prompts:
  - Which of your current roles fulfill your professional identity?
  - Do you envision maintaining a connection with that role after retirement?
  - Which of your roles do you plan to give up?
  - If you could re-create your present job keeping the parts you love, what would it look like?
  - What does your timeline look like to achieve these role transitions?
  - Who needs to agree with your role transition plans?
  - What barriers do you see to implementing these decisions?
- 5 min - summarize main points from coaching session
- 5 min – confirm post session reflection and action

Post Session Reflection and Action
Reflect on the following prompts following the coaching session:

1. What will be my role within the department or university once I retire?

2. What is a timeline to achieve my role transitions?

3. Whom do I need to speak to that has some connection or stake in the roles I serve and may support me clarifying how to adjust my roles moving forward?

5. CAREER GOALS AND CAREER LEGACY

We begin our careers with dreams, visions and expectations of professional fulfillment and life satisfaction. With experience and growth, our perceptions and goals mature and shift. You may find that early career goals of earning a raise or a promotion are replaced with later career goals of developing yourself as a leader or re-balancing time for personal and professional pursuits. In the later phases of your career, you may think more about your career legacy, and envision the enduring contributions of your professional journey.

Pre-Work

Think about what led you to take your chosen professional path. Recall the goals you initially set and the aspirations of success that drew you forward. Our personal and professional selves are shaped by maturity and longitudinal experiences. Over time, career goals evolve. What you imagined would be the most fulfilling and inspiring career accomplishments might be quite different than those that you envision today. Consider how your earlier career goals contrast with your current goals.

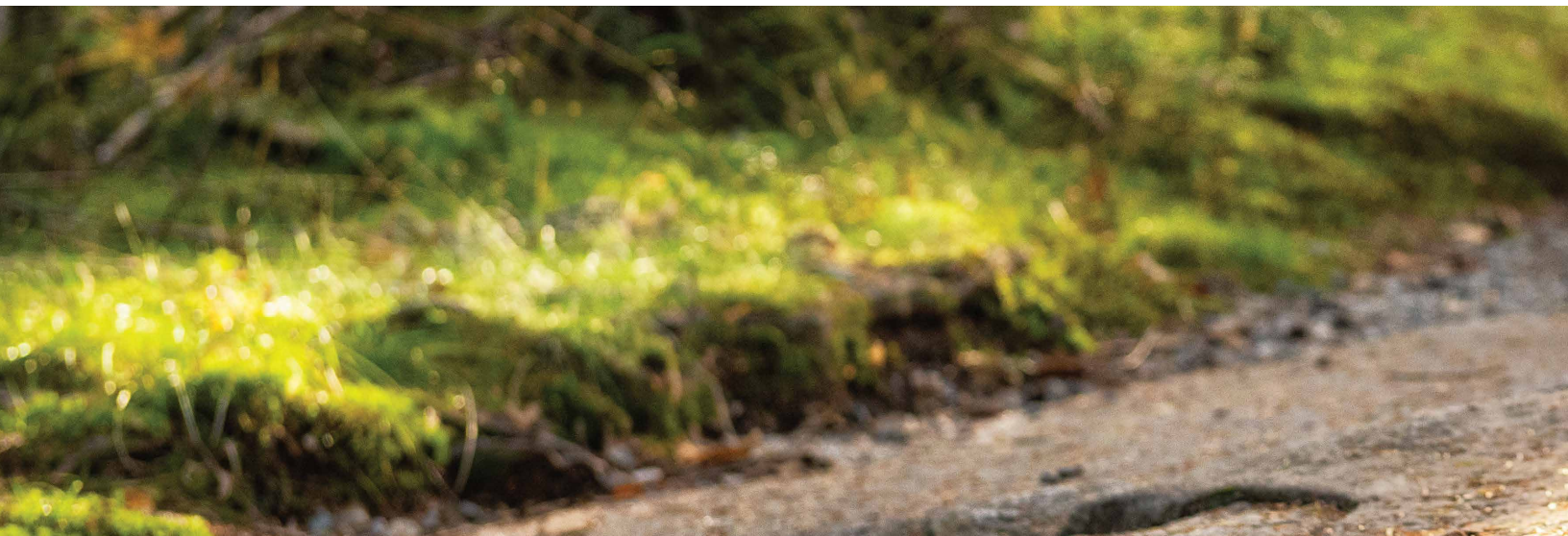
Reflect on the following prompts prior to the coaching session:

1. What are your current career goals? How do today's goals differ from the ones you had when you began on this career path?

2. Thinking ahead, what do you see as your enduring contribution to your profession?

3. How can you direct your current professional work to support the career legacy that you envision?

4. How do your career goals interface with your personal goals? What do you think is your personal legacy? How does your career legacy compliment your personal legacy?



During the Coaching Session
With your coach, define your current career goals. Build upon the foundation of your professional accomplishments, including experiences of success and failure. Knowing what you know now, explore how your career goals and your aspirational career legacy have evolved.

- 5 min - recap and updates
- 5 min - client relates their reflections from the pre-work
  40 min – Coaching Session Body
  - Explore how your current career goals differ from your early career goals. To what do you attribute the evolution of your goals?
  - What are you goals now?
  - Consider how your personal and professional goals align. Explore what is most important while also naming those things that are of lesser importance (setting the stage for letting go and making room)
  - Describe the career legacy that you aspire to leave. What actions can you take now to fulfill that legacy?
  - What do you need to do now to fulfill your personal goals?
- 5 min - summarize main points from coaching session
- 5 min – confirm post session reflection and action

Post Session Reflection and Action
After meeting with your coach, revisit the pre-session work and clarify your responses by writing/rewriting your thoughts to the following questions:

1. List your current career goals. Describe how they have evolved from early career goals.

2. Thinking ahead, describe your enduring contribution to your profession.

3. Name 3 steps you can take now to build the career legacy that you envision.

4. Considering the relationship of your career goals to your personal goals, identify an action you can take now to ensure that your career and personal legacies will be accomplished.



6. DEVELOPING INTERESTS AND PRIORITIES OUTSIDE THE CAREER

Transitioning to retirement opens the door for you to explore interests and priorities outside of your career. Having outside interests and priorities becomes crucial to successfully navigate your new life. Considering what this may look and feel like will support more flow into retirement. It's never too late to try something new! The earlier you start dreaming and setting up a full life outside of your career, the more opportunities and options you can create before you actually retire.

Pre-Work
Reflect on the Following prompts prior to the coaching session:

- What present activities do you already enjoy that you would like to increase?

- How do you want to emotionally feel in retirement? (Hint-Happy is not the answer-go deeper)

- What roles do you enjoy unrelated to your career?

- Who are you outside of your professional label?

- Do you have a "bucket list" that you could review and prioritize?



During the Coaching Session

- 5 min - recap and updates
- 5 min - client relates their reflections from the pre-work
  40 min – Coaching Session Body
  - Who is your community outside or work and how do you participate in this community?
  - What is your vision or life outside of your career?
  - Based on how you want to feel in retirement, what path would you follow to feel this way?
  - What activities could you initiate in the next month? What activities could you participate in more regularly?
  - Other topics:
- 5 min - summarize main points from coaching session
- 5 min – confirm post session reflection and action

Post Session Reflection and Action
Reflect on the following prompts after the coaching session:

1. What first step will you take to begin a chosen new activity?

2. How will you explore a new role or more participation in a community that is important to you?

3. Plan how to check off the highest priority on your “bucket list?”



7. CONSIDERATIONS OF FINANCIAL SECURITY

It is essential for you to have a comprehensive understanding of your financial situation to assist in planning for retirement and ensuring you have the resources needed to fund the lifestyle that you and your family desire. Consultation with a qualified financial advisor may help you make informed decisions about retirement.

Pre-Work
Reflect on the Following prompts prior to the coaching session:

1. What is my current financial situation?

2. Am I comfortable managing my financial retirement planning or do I need assistance?

3. Have I discussed my financial and lifestyle goals with my partner or family? Do we agree?

During the Coaching Session
The following format is suggested for this session discussing succession planning and how it fits into a retirement plan.

- 5 min - recap and updates from previous session
- 5 min - client relates their reflections from the pre-work
- 40 min – Coaching Session Body
  - Examples of prompts:

  - General Questions

    - Do I have enough saved for retirement? Does my partner, if applicable?

    - Have I consulted with a financial advisor (TIAA, Fidelity, etc.) to evaluate my financial standing and future needs?

    - Have I explored any potential part-time work or consulting opportunities to supplement my retirement income?

  - Questions to consider before meeting with financial planner (TIAA, Fidelity, Bank, Personal Advisor)

    - Have I made a realistic retirement budget that includes projected retirement income, healthcare costs, living expenses, taxes, and any outstanding debts?

    - Do I anticipate my spending to go up or down after retirement?

    - Have I planned for rising healthcare costs as I age and the potential need for long-term care?

    - Have I considered the impact of any ongoing financial obligations, such as supporting children or elderly parents?

    - Do I have an emergency fund set aside for unexpected expenses during retirement?

    - Do I understand Social Security, and do I have a claiming strategy?

    - What will the financial situation look like if I or my partner pass first?

- What is my long-term goal for my assets? Spend the last dime on the day I die? Preserve and pass on wealth to family? Charitable bequest?

◦ Questions to consider before meeting with Human Resources (Department, Campus, or Hospital as applicable)

- Do I have a clear understanding of my non-financial retirement benefits?
- Does my partner or family understand my benefits?
- Does my partner understand their own benefits, if applicable?

◦ Questions to consider before meeting with an estate planning lawyer (financial planners often have lists of attorneys they work with)

- Have I reviewed and updated your estate planning documents, including wills, trusts, and powers of attorney?
- Have I shared this information with those who are tasked with carrying out my wishes as outlined in the will/trust?

- 5 min - summarize main points from coaching session.
- 5 min – confirm post session reflection and action.

Post Session Reflection and Action
Reflect on the following prompts after to the coaching session:

1. What is my current financial situation and have I saved enough for the retirement lifestyle I desire?

2. Do I have a clear understanding of my retirement financial plan including pension plans, social security, other retirement accounts, healthcare insurance?

3. Is my retirement timeline financially realistic?

4. Where will I seek information to advance my knowledge and assess my financial planss?

5. What are the key next steps that I need to take to prepare financially for retirement?

6. What or who do I need to get information from to confirm some of this knowledge around my financial ideas?

8. COORDINATION WITH PARTNER AND FAMILY

A shift in one's inner world and identity and a reorganization of major life roles are almost inevitably accompanied by disequilibrium in one's central relationships inside and outside the family. Cowan & Cowan 20121

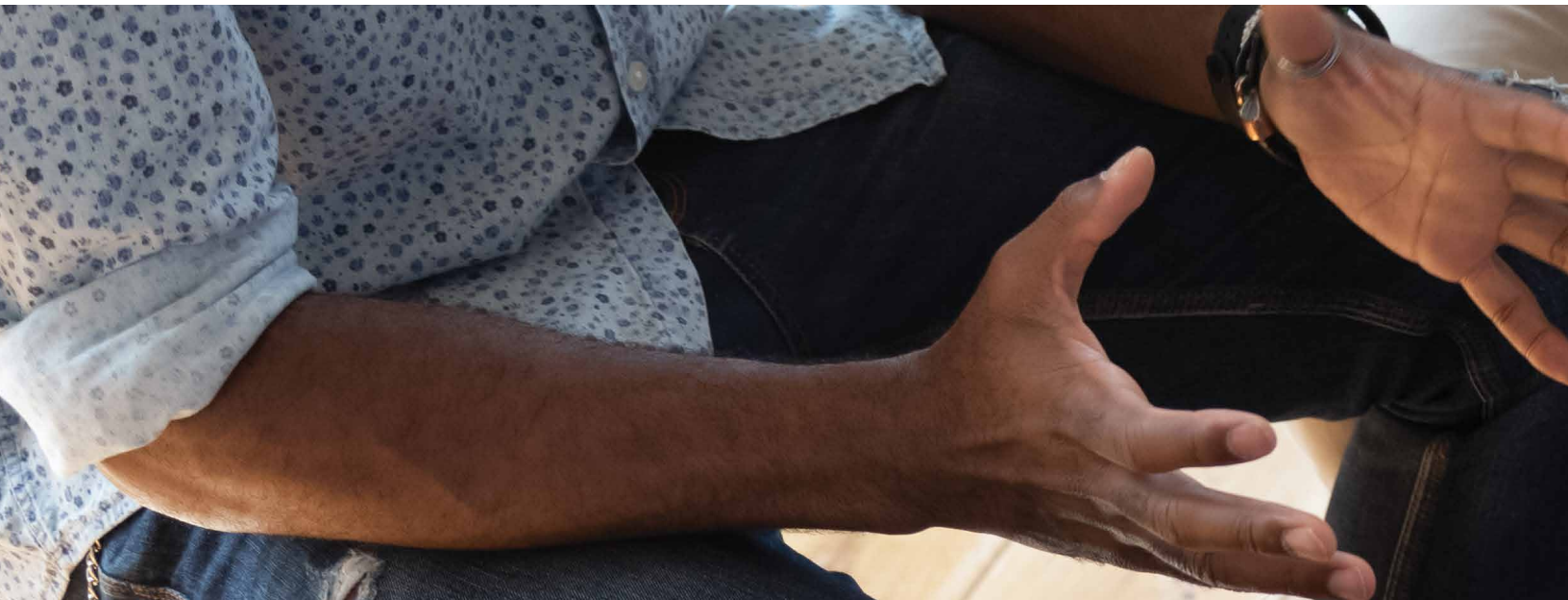
What does it mean to be late career? As noted in Figure 1.1, the transition from maturity to late career generally involves a change in focus from career building to legacy building. Ideally, it also includes considering how—and when-- you will transition to retirement. These decisions are challenging—your work has been an important part of your identity, and your identity will change during this phase, whether your next step is retiring outright or as an emeritus faculty member, continuing your connection to your career in some other role, or reinventing yourself in a new career. Communication and alignment with your partner, spouse, and others in your life is crucial as you make these decisions and build your new identity. Beyond partners, your pets, your kids, your work colleagues, and your leisure-time companions will all be affected by what you decide the next chapter of your life will look like—and how you make the transition.

Many decisions are required for the transition to retirement or another late-career phase, including: Where will I live? What will I do? How will I afford it? What will change? How will I prepare for disruptions to my plans (e.g., health, disability, caregiving)? What will I use my money to support (i.e., will/trust/giving)? If you have a partner, family, or others you interact with day-to-day, these questions really should be posed as: Where will we live? What will we do? etc. A major source of conflict during transitions is lack of alignment of expectations, aspirations, and goals. Honest, curious, two-way communication on these topics is the best way to address different expectations and develop alignment as you prepare for a transition.
See Appendix C for a detailed approach to decision-making that can support these discussions.

The timing of retirement for each partner is another potential source of conflict, especially when one partner is older than the other. Retiring at the same time means you are both going through the stress of a transition simultaneously, which may reduce capacity for being supportive of each other, although it may also be helpful to have the camaraderie of a shared experience. Retiring at different times distributes the stress of transition, but it may impact the ability to fulfill some retirement goals (e.g., travel), due to the partner's more limited time off.

During transitions, roles change in different ways—by addition (e.g., taking on more household tasks), subtraction (e.g., reducing or giving up your work identity), and revision (e.g., altered income and health insurance). It is important to consider all the ways your life and identity will change as you enter the next phase of your life, especially when you retire. The resources listed at the end of this section provide detailed discussion of how to prepare with your partner to reduce the stress of transition.

Most of the articles that address financial, emotional, and practical decision-making for late-career transitions, including retirement, focus on retiring with a spouse. Most of these considerations apply regardless of who the people with joint decision-making power in your life are, so they can be adapted to apply in your specific circumstances. If you are not married to your partner, however, there are some differences, especially related to finances, that make it crucially important that your deliberations include discussions of these considerations in financial planning (see Section 7).



Pre-Work: Reflection
As you reflect on how to develop your new identity and how to align your late-career transition plans with a partner/family/others, here are some questions to consider:

1. Major life transitions, like retirement, typically involve a mixture of changes – in each person's sense of themselves, in their roles, and in their relationships. What are your expectations, aspirations, and goals for retirement (or the next phase in your career)? How do they align with other people in your life? How do they align with your work? With your finances?

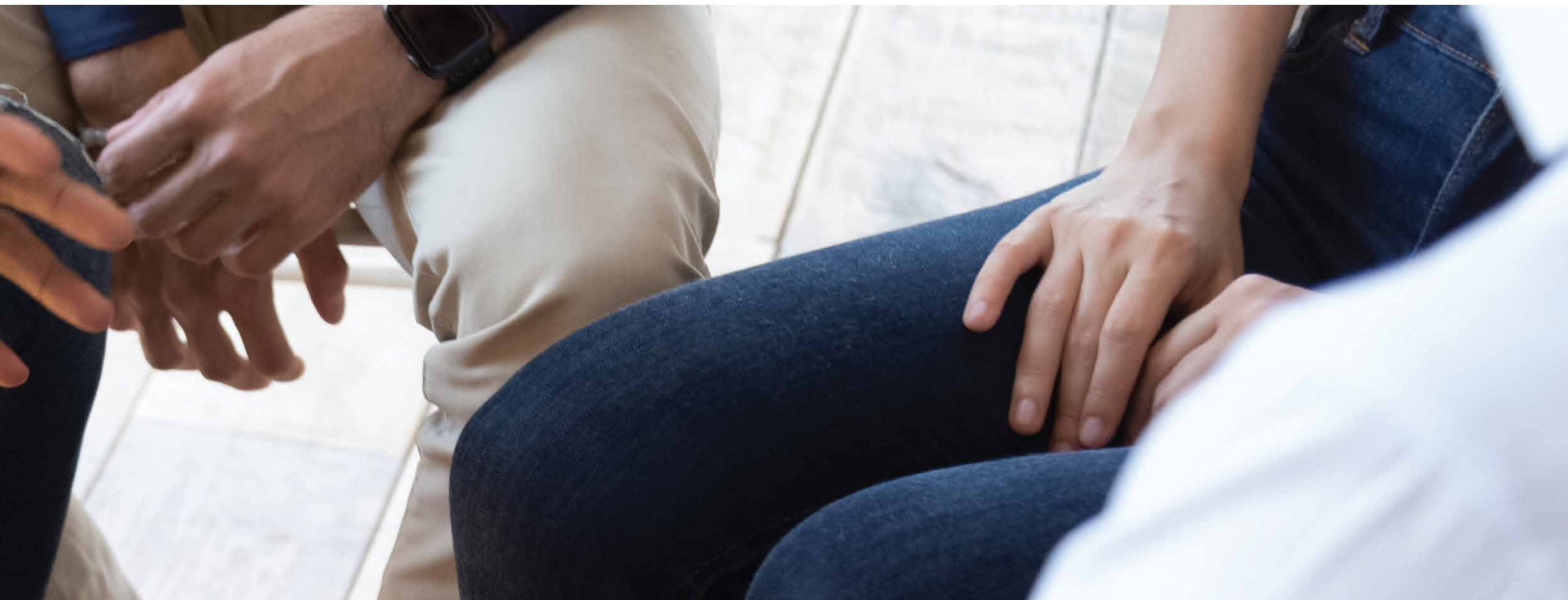
2. How will these changes affect your relationships, including those with your partner, family, colleagues, mentees, and pets?

3. How much time and energy do you want to spend with your partner/family/others vs. in separate activities?

4. How would being home more disrupt longstanding habits and relationships?

5. How will you communicate with your partner/family what you want? How will you listen to what they want?

6. How will you align your visions with your partner/family/others to reduce the uncertainty, instability, and conflict inherent in transitions?



During the Coaching Session
The goal of a coaching session related to coordination with a partner, family, and/or others, is to gain insight on relationship challenges you may face in the transition to the next phase, and how to approach communication, alignment, and decision-making with those individuals.

- 5 min – Connection, recap, and updates on actions since previous meeting(s).
- 5-10 min – Client relates their reflections from the pre-work and identifies any goals the pre-work created for the session. Coach summarizes, reflects, and asks questions to clarify the goals and what a successful session would look like.
- 30-40 min – Coaching Session Body
  - If the client has a clear goal they would like to work on, the coach should ask client-centered, open-ended questions, support and reflect on what they hear, and challenge the client to think more broadly or test their assumptions, to facilitate the client gaining insight and developing a set of actions to advance that goal.
  - If the client doesn't have a specific goal, the coach can get the conversation started with one or more of these prompts:
    - What would a successful transition to the next phase look like? What steps can you take to make it a reality?
    - Who are the individuals who will be affected by what you decide to do? Who are the individuals who have a say in deciding what you do?
    - What conversations have you had with these individuals about the future?
    - What conversations do you need to have, and with whom, as you think about options for the next phase?
    - How could you approach these conversations? Is there anything that makes them feel difficult? What might facilitate good conversations?
- 5 min – Client will summarize their major insights and goals from the session. Coach will reflect, summarize, and make observations related to those insights and goals.
- 5 min – Client will identify potential actions; coach will facilitate clarity on those actions, including details of how the client will accomplish them, and provide accountability for the client following through on those actions.

Post Session Reflection and Action
During the session, the client will have gained insight into how the transition to the next phase(s) will affect themselves, partners, family, and others. They will have developed action plans for engaging in reflection and conversations related to aligning visions and goals for the next phase. After the session, clients should reflect on the following:

1. What conversations have you already had? What conversations do you need to have? How will you engage in those conversations?

2. Whose input do you want in your decisions? Who has a vote in your decisions?

3. How will you resolve differences that arise in those conversations?

Resources
These references are intended to help you consider how to communicate and collaborate with your partner and family to make the best decisions for each of you, and for the group as a whole.

1. Cowan, P. A., & Cowan, C. P. (2012). Normative family transitions, couple relationship quality, and healthy child development. In F. Walsh (Ed.), *Normal family processes: Growing diversity and complexity* (pp. 428–451). The Guilford Press.

2. Hopf L & Welter W. Rethink, Reinvent, Reposition: 12 Strategies to Renew Your Business and Boost Your Bottom Line. Avon, MA: Adams Media, 2010. (Chapter 4 discusses the 7 attributes of a high quality decisions).

3. Myers W. How to Avoid Retirement Planning Risks for Couples. https://www.synchronybank.com/blog/retirement-planning-risks-for-couples/.

4. Berkeley Retirement Center. Retirement and Your Relationship. https://retirement.berkeley.edu/retirement-planning/retirement-and-your-relationship.

5. Fidelity. Aligning Your Retirement Vision With Your Spouse. https://www.fidelity.com/learning-center/wealth-management-insights/aligning-retirement-vision.

6. Wealth Strategies Group. Retiring as a Couple: Important Factors to Consider. https://www.wealthstrategiesgroup.com/retiring-as-a-couple/.

7. Measom C. How to Coordinate Retirement Plans with Your Spouse. https://www.gobankingrates.com/retirement/planning/how-to-coordinate-retirement-plans-with-your-spouse/

8. Benz C. How to Retire: 20 Lessons for a Happy, Succesfsful, and Wealthy Retirement. 2024 https://bookshop.org/p/books/how-to-retire-20-lessons-for-a-happy-successful-and-wealthy-retirement-christine-benz/20975346?ean=9781804090695&next=t



9. SUCCESSION PLANNING

One of the key components in planning a successful retirement is acknowledging that the roles you now hold will be held by others. Identifying and developing individuals who will be taking over your key roles takes careful consideration. Succession planning is an ongoing process and an important early step in a successful transition to retirement.

Pre-Work
Reflect on the following prompts prior to the coaching session:

1. What is required to replace my contributions to the department?

2. Which of my roles are critical to the success of my division, department, school, or outside organization?

3. Who are the key individuals in my organization with the skills, knowledge, and potential to assume these roles?

4. Are there any skill/knowledge gaps among potential successors?

5. How long of a transition period is needed? How does that fit with my own retirement plans?

During the Coaching Session
The following format is suggested for this session discussing succession planning and how it fits into a retirement plan.

- 5 min - recap and updates from previous session
- 5 min - client relates their reflections from the pre-work
  40 min – Coaching Session Body
  - Examples of prompts:
  - Which of your roles require a clear succession plan?
  - How are succession candidates identified? Internal or external?
  - How can you assess and evaluate the capabilities and readiness of potential candidates through a systematic and objective process?
  - What additional training, development, or experience may be required to prepare individuals for future leadership roles? How can these be provided?
  - Who makes the decision on who takes over your roles?
  - What will your role be once someone takes over your role?
  - If you have grants, how will they be transitioned or will they be ended?

- How long will you be willing to hold on from retiring while looking for the “perfect successor”?
- What do you see as your role within the department or university once you retire? No involvement, teaching and mentoring, specific projects, emeritus status?
- How will you measure the success of the succession plan?

- 5 min - summarize main points from coaching session
- 5 min – confirm post session reflection and action

Post Session Reflection and Action
Reflect on the following prompts after the coaching session:

1. Who are likely the best candidates to take over my key roles?

2. What support do I need to carry out a succession plan?

3. How does the succession plan fit with my own timeline?

4. What will be my role once I give up my current role(s)?



10. NEGOTIATING FOR A NEW WORK ARRANGEMENT

Once the client has clarified their values and developed goals around their intended future, it is time to engage stakeholders to discuss new work arrangements, including topics such as phased retirement versus decreasing FTE. Part of the discussion may be around succession planning, which is covered in a previous section. This section seeks to clarify the client's desired work arrangement and to effectively negotiate to find a mutually agreeable work arrangement.

Pre-Work
In this section, the client may be drawing from insights from previous sections. Such insights include what work to keep and what work to shed. Prior to this coaching session, clients should reflect on the following:

1. What is the time frame for activating the new work arrangement?
2. When is the anticipated ending point for the new arrangement? What are the phases?
3. What is the work that one would want to keep, let go of, or add? What are your options?
4. What physical things (office space, contents, equipment, parking spaces, etc) would one want to keep or give away?
5. What is the desired relationship with the employer in the short and medium-term?
6. What are some points of leverage that the client has which could influence the negotiation?

Refer to items 1 and 2 above.

	Phase 1	Phase 2	Phase 3
Timing			
Description			

Refer to items 3 and 4 above.

Let Go Of	Keep	Add

Refer to item 5 above.

Refer to item 5 above.

During the Coaching Session
The coaching session is designed to solidify the client's interest and intentions and to assess their negotiating position. The session will also allow for the coaching dyad to explore potential options and negotiating positions which may lead to a creative and mutually acceptable outcome.

- 5 min - recap and updates
- 5 min - client relates their reflections from the pre-work
  40 min – Coaching Session Body Examples of prompts:
  - What is the main form of value that you currently provide?
  - If you were to leave today, what would happen?
  - What would you like to see happen to your professional space(s) and possessions?
  - If you were to let go of certain responsibilities over time, how might that proceed?
  - What are the main interests of the person you are negotiating with? Relative to you and in general.
  - What might be some ways that you can meet the interests of the other person? What might you want in return? How could you make the transition into a 'win-win'?
  - What is your "reservation point" (the minimum that you are willing to accept)?
  - What is the worst-case scenario? How would you respond?
  - What is the best-case scenario? Why might the other person be willing to agree? What might others think if you got the 'best-case scenario'?
  - What are the things which are in your control? What are the things which are not?
  - What might happen if you did NOT negotiate?
  - What kind of relationship do you have with the person you are negotiating with, and to what might they be agreeable?
  - Who might you enlist to help you make a stronger case?
  - What is your next step? What will you do in the next week to set things in motion?
  - How might you initiate a meeting to begin the negotiation?
  - (other mutually agreed prompt)
- 5 min - summarize main points from coaching session
- 5 min – confirm post session reflection and action

Post Session Reflection and Action
After each coaching session, assign the client some homework in the form of follow-up reflection and action items. Potential homework items include the items below:

1. Revise and confirm the items in the pre-work section
2. Initiate a meeting with the person with whom you would like to negotiate (worded in friendly terms)
3. What were the 3 main take-away points from the coaching session?
4. Why is it important for me to secure a new work arrangement?
5. How might I negotiate in a way that preserves the relationship but also allows me to get what I require?

Resources
Below are resources around negotiations that the client may want to access:

1. Voss, C., & Raz, T. (2017). Never split the difference. Random House Business Books.
2. Klaff, O. (2011). Pitch anything: An innovative method for presenting, persuading and winning the deal. New York: McGraw-Hill
3. Fisher, R., Ury, W., & Patton, B. (2006). Getting to yes (2nd ed.). Penguin Putnam.
4. Gallo, A. How to Ask Your Boss for an Unpaid Leave to Travel, Study, or Spend Time with Family. Harvard Business Review, Feb. 2019.
5. Fisher R, Ury W, Patton B. Getting to Yes: Negotiating Agreement Without Giving In. Penguin Books 2011.

During a negotiation, it would be wise not to take anything personally. If you leave personalities out of it, you will be able to see opportunities more objectively.
– Brian Koslow

Modes of Developmental Relationships

Gap to be Addressed:
Perspective and Experience

When to Use:
When a mentor and mentee share a common pathway; the mentor can guide from their greater experience

Example Cases:
Modelling skills and way of being
Sharing experience / perspective
Developing professional goals (e.g. Individual Development Plans)

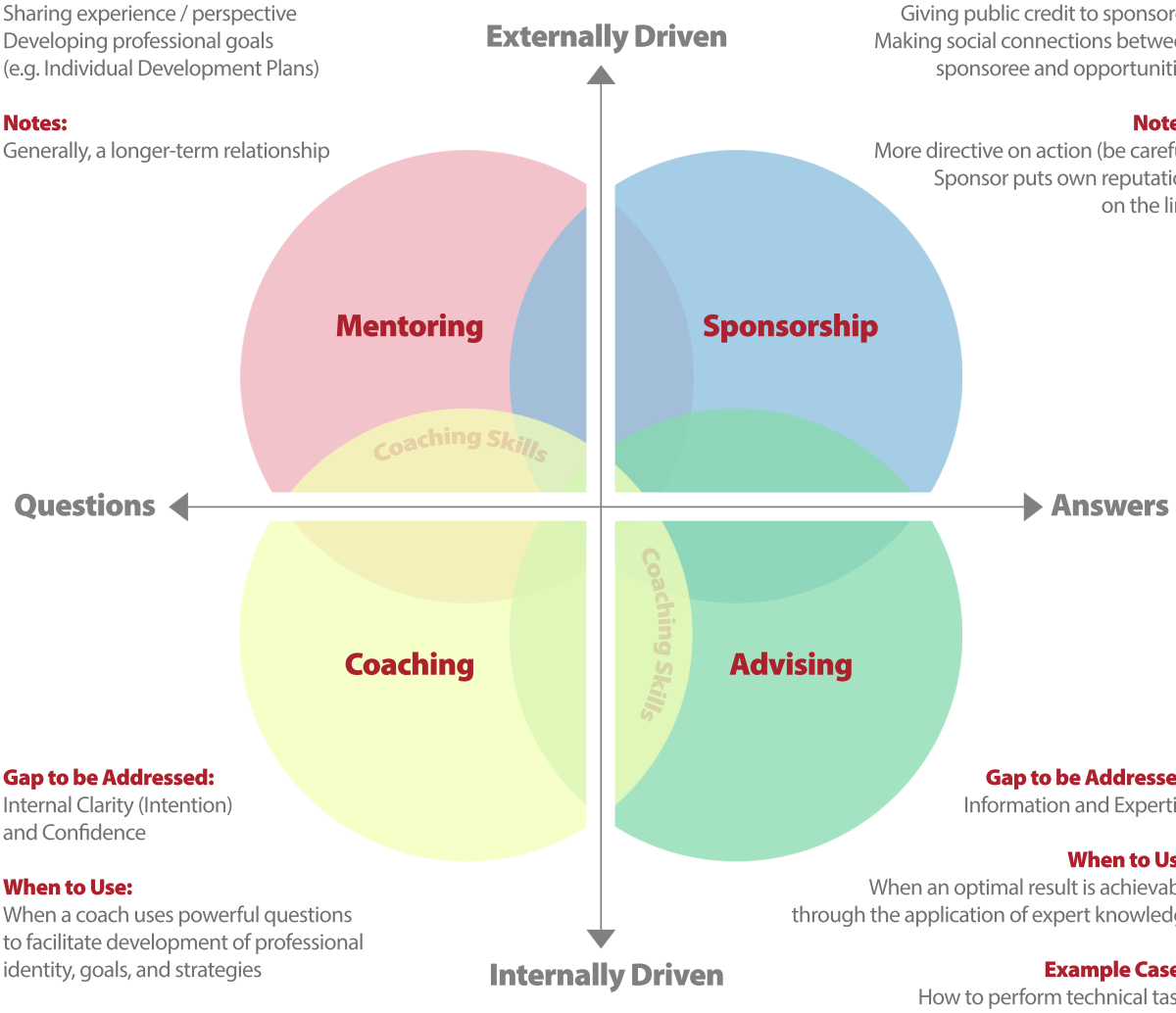
Notes:
Generally, a longer-term relationship

Gap to be Addressed:
Connection and Endorsement

When to Use:
When a sponsor has greater social resources to advocate for and connect sponsorees with opportunities

Example Cases:
Nominating someone for role
Giving public credit to sponsoree
Making social connections between sponsoree and opportunities

Notes:
More directive on action (be careful)
Sponsor puts own reputation on the line



Gap to be Addressed:
Internal Clarity (Intention) and Confidence

When to Use:
When a coach uses powerful questions to facilitate development of professional identity, goals, and strategies

Example Cases:
Reflection on personal values
Making important career choices
Setting professional goals and plan
Accountability partnership (balancing challenge and support)

Notes:
Coachee drives agenda and goals
Coach drives process

Gap to be Addressed:
Information and Expertise

When to Use:
When an optimal result is achievable through the application of expert knowledge

Example Cases:
How to perform technical tasks
Navigating specific processes
Information on choice options

Notes:
More directive on choice (be careful)
Onus of action on the advisee

Developed by Antonius Tsai and Harriet Hopf

APPENDIX B. TELLING YOUR STORY



MASTERING YOUR LIFE
STORY & PURPOSE

Who you are, including your talents and desires, are different from those of others. How will you live your life in a way that honors your unique potential to contribute? Day to day, we make decisions, take actions, and think thoughts. We have worries and doubts. We experience joy and connection. But what does it all mean? The meaning is something we create for ourselves The way we create meaning is to link our past, present, and future into a narrative. This narrative is inclusive of our past experiences, our current choices, and our future aspirations. This story that we create for ourselves then shapes our lives and the experience of our lives. The story of you is unlike that of any other, if you have the courage to live it. To create this story we need to answer three basic questions.

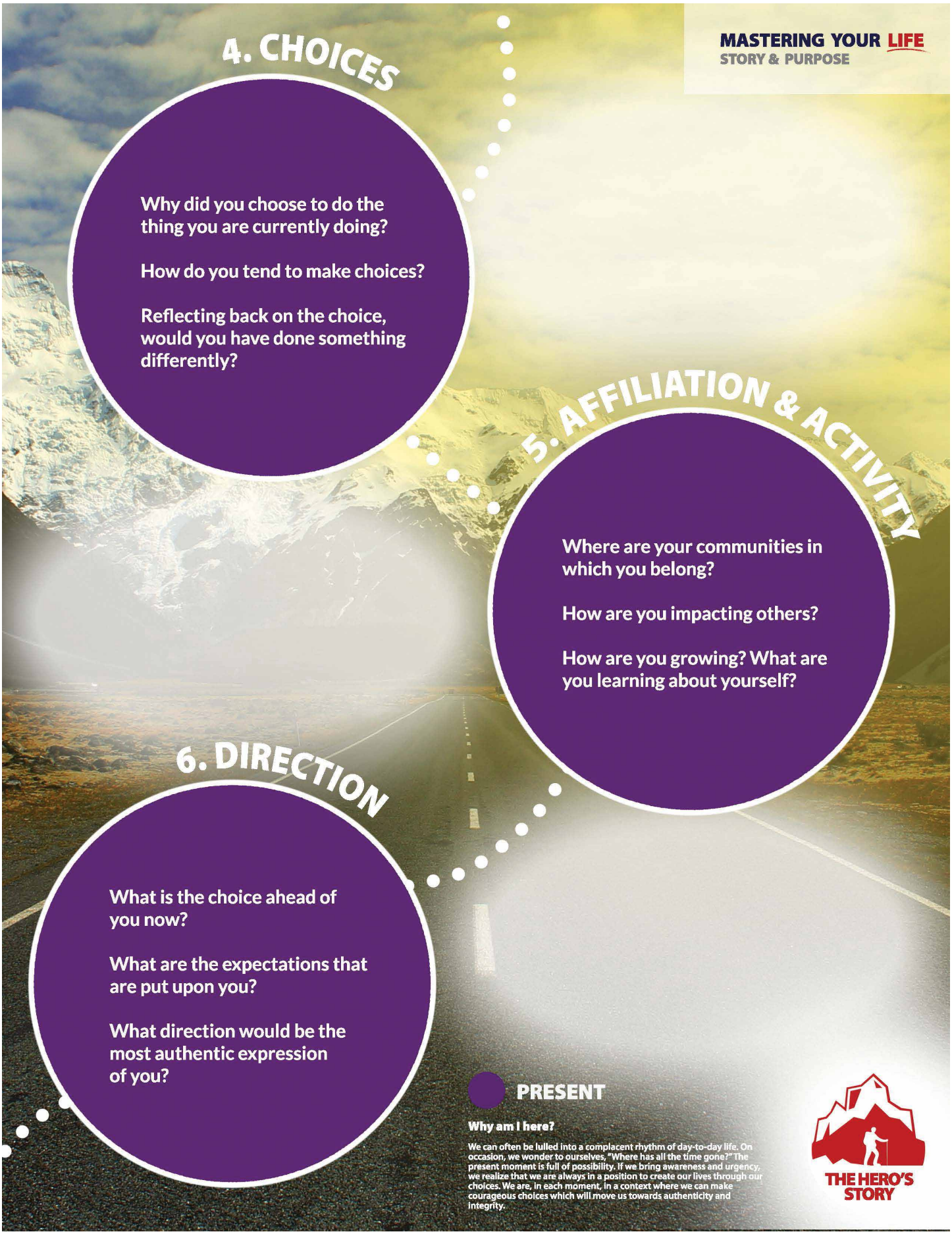
Where did I come from? (Past)
You have a past that shaped your worldview. This past included people and experiences which had a formative effect on you. Why do you value one thing over another? What was something missing that you desired? In seeking fulfillment, your past holds many clues.

Why am I here? (Present)
Life is a busy blur. There are daily demands on you as well as endless distractions. You pause to reflect, "What is important that I need to pay attention to?"

Where am I going? (Future)
This is full of uncertainties. We are told that we should have clear goals and direction, but it doesn't work out that way in practice. How shall we translate our dreams in a way that we can possibly embrace?

Are you ready to create your story?


1. BACKGROUND
What was the most noteworthy or distinctive aspect(s) of your background?
What kind of kid were you?
How would you describe your relationship with your family?
2. VALUES
What was important to you growing up?
What kind of activities did you engage in that was meaningful?
Who did you look up to?
3. FORMATIVE EXPERIENCE
What was something you did or experience which "shaped" you?
What was the biggest challenge you faced?
What was something you accomplished that you were most proud of?
PAST
Where did I come from?
When you were growing up, many forces and influences shaped how you saw the world and how you're related to others. Important aspects of your personality emerged. You bonded with some important figures in your life. You began to take an interest in certain things over others. Significant early challenges taught you important lessons, including what is important in your life. Reconnecting with our past offers meaningful insight to our present circumstances.
THE HERO'S STORY


4. CHOICES
Why did you choose to do the thing you are currently doing?
How do you tend to make choices?
Reflecting back on the choice, would you have done something differently?
5. AFFILIATION & ACTIVITY
Where are your communities in which you belong?
How are you impacting others?
How are you growing? What are you learning about yourself?
6. DIRECTION
What is the choice ahead of you now?
What are the expectations that are put upon you?
What direction would be the most authentic expression of you?
PRESENT
Why am I here?
We can often be lulled into a complacent rhythm of day-to-day life. On occasion, we wonder to ourselves, "Where has all the time gone?" The present moment is full of possibility. If we bring awareness and urgency, we realize that we are always in a position to create our lives through our choices. We are, in each moment, in a context where we can make courageous choices which will move us towards authenticity and integrity.
THE HERO'S STORY


7. CHALLENGE
What is a challenge in your next stage that you would like to tackle?
How would you use your strengths and skill to overcome that challenge?
In what way do you wish to grow and develop?
8. VISION
How do you ultimately define success for yourself?
What kind of person will you become?
What kind of impact will you have on others?
9. THE NEXT STEP
What can you do to get started?
What is the next immediate milestone?
What will happen if you don't take action?
FUTURE
Where am I going?
As living beings, we have a desire to live life more fully. We want a greater experience of being alive. Through our vision, we work to create a future of becoming our greater selves. Along they way, we will confront challenges which serve to test our commitment and grow our capacity. The future journey is a long one, where we can only see the faint outlines of a distant goal. As we reach each goal, our horizons are expanded and we see the next goal.
THE HERO'S STORY

APPENDIX C: STRUCTURED DECISION-MAKING

Discussing your ideas for career transitions, and especially retirement, with your family is critical to reduce stress and conflict during such a transition. And it can be challenging to start the conversation, especially if it's a conversation you really haven't had before. This worksheet is intended as a resource for such family discussions. It may identify challenges you would like to discuss with your coach, but the primary purpose is personal conversations at home.

Much of the communication required to align with your partner/family/others in planning for a transition to retirement or other late-career phase involves decision-making (e.g., Where will we live? What will we do? How will we afford it?). The Structured Decision-Making Tool is a useful way to approach decision-making, based in seven attributes of a high quality decision: having the right people involved; clear and aligned objectives; a defined and structured decision; recognition of the full range of choices; knowledge about preferences, options, and requirements; evaluation of each choice as it relates to the objectives; and alignment and commitment to enable execution of the decision.

1. **People, Culture, Decision Process:** Are the right people involved? Are we making the decision in a way that makes sense for us? Lots of people will have opinions about when—and how—you should retire. You probably have to listen to their opinions. But who gets a vote when you make the decision? The more people you allow to have a vote, the more you will need to compromise, and the more difficult it will be to decide. This will lead to frustration, resentment, and, potentially, not doing what you truly want to do. In general, choices related to retirement should be decided by the smallest group possible (i.e., you or you and your partner). This section should be completed first, because who gets a vote will determine who participates in the next 6 sections. How do you decide who gets a vote? One approach is to ask yourself: If we don't agree, how will I/we make the decision? If the answer is: we'll come up with a plan that isn't perfect, but we will both commit to it, then they get a vote. If the answer is: if they don't like it, I'm doing it anyway, then they don't get a vote. No decision will perfectly meet everyone's expectations, aspirations, and goals, so defining the objectives is crucial	• Who are the people and resources I need to include to make a high-quality decision? • What is my process for identifying and engaging them? • Who will have a vote on the final decision?
2. **Objectives:** Who are the players and what do they want? There are two components to the objectives: what you value and what you want to do. What you want to do might include when to retire, where to retire, how to retire, what activities you will engage in, how much time you will spend together, how you will make decisions, and how you will finance your lives. Values might include your happiness, your partner's happiness, financial, family, and community impacts, and other things you care deeply about that will be affected by what you do. This will allow you to see where you already agree (e.g., both want to live near grandchildren), where you need more information (e.g., How much do we have in our retirement accounts? Does it matter financially at what age each of us retires? How much would a condo in Sun Valley cost?), and where decisions will need to be made (e.g., one partner wants to travel, while the other wants to engage more deeply in the local community).	• Individually, each partner writes down their major expectations, aspirations, and goals (what they want to do) for the next phase, then lists them in order of priority. • It's important to be honest here! To ensure alignment, you might also ask each partner to list what they think the other wants and compare that to what they actually want. • Individually, each partner lists what they value: what they want to maximize, and what are they are willing to trade off. Which are the things that matter most, and which are less important? • Review the list together to identify what needs further discussion.

3. **Structuring:** How are you defining the decision, and what are you taking as given? • Does everyone understand and agree on the givens? • What decisions need to be made? A given is something that is taken as decided and does not require further discussion. Givens are typically sentence-long statements that test to discover if you already agree on certain areas. This eliminates time wasted exploring things you already agree upon and to allow you to quickly focus on points of disagreement. For example, if you both list living near grandchildren as an objective, that isn't a decision that needs to be explored further—it's a given. Decisions that need to be made are defined by priorities where you and your partner are not aligned. It is useful to begin with 1-3 objectives identified by each of you as highest priority, since they are cornerstones that may impact how decisions around lower priority topics are made.	• Discuss and agree on the givens. These are useful when developing choices: if an option conflicts with a given, it can likely be dismissed without further discussion. • Discuss and agree on which conflicting topics/objectives you want address in the next sections of the worksheet. They can be addressed simultaneously or in series, depending on the degree to which a decision on one impacts a decision on another.
4. **Choices: For each decision, what is the full range of action open to you?** Is there more than one choice, or is it a "do it, or don't do it" situation? [hint: there are usually more options than you think!] Are all the choices conventional, or have you also been creative and considered something a bit out of the ordinary? It's easy to get caught in either-or decision making: should we take this opportunity or not? Should we do this or that? But identifying a broader range of options helps define givens you didn't realize you had (or eliminate givens you thought were set in stone), broaden your view of what's possible, and find options that work best for you. For example, the conflict between travel and engaging more deeply in local community could be resolved by doing some things separately, by splitting time spent together between traveling and engaging in the local community, or by engaging in the community during travel.	• For each decision, generate a list of choices of action to resolve the conflict. A good approach is to generate lists independently and then brainstorm together additional options. • Review the options to ensure you have at least one wild, unconventional option!
5. **Knowledge:** Given the options you have generated, what do you know, and what don't you know? • What key knowledge gaps impede your decision? • Which uncertainties matter the most for your decision? Information gaps might include: What are the financial implications of retiring at a given age? How much do we currently spend and how will that change with retirement? Will our kids be moving? If we move to a smaller place, which of our belongings would we give up? What local boards might be interesting (and possible) to serve on?	• Make a list of the information you are missing for each decision. • Discuss where to find the information required. • Agree on who will be responsible for • findingwhich information. Set a (realistic) timeframe, so you don't lose momentum.

6. **Evaluation:** How does each option rate for aligning and meeting your objectives? • Have you explored the trade-offs that arise from each option? Once you have key information for a range of choices defined within your objectives, givens, and individual values and priorities, you can evaluate each choice considering financial, emotional, practical, and other considerations. You can create a table to rate how each choice looks for the considerations that matter most.	• For each decision, make a table with a row for each of your options. The columns will be the values you identified in part 2 of this worksheet. • Evaluate each cell in the table by giving it a positive, negative, or neutral rating. Identify the best option by its ratings on the things you care about.
7. **Execution:** Is everyone needed for successful execution aligned and committed? • Does each partner understand what has been decided, and are they aligned and committed? • What are the potential stumbling blocks for execution? You know what you want to do. Do the people with votes agree? Do they still get a vote? Do you have a plan, are you aligned on the plan, and are you ready to set the plan in motion, committed to completing it? If you decide then don't act, you really haven't decided. Indecision keeps your options open, but doesn't allow you to move forward with the next phase. So, getting aligned on the plan is only a start: you also need commitment and follow through to make it happen.	• Review a list of the givens, objectives, and agreed upon choices. Can each partner commit to these decisions? • Make a list of actions required to meet each objective and assign a person and timeline to each action.

Example Evaluation Table (options are rows; values are columns)

	Your Happiness	Partner Happiness	Financial Implications
1. Travel /engage separately	+	+	0
2. Split time between joint travel and joint engagement	++	++	+
3. Engage during travel	-	-	-

In this example, option 2 rates highly across the board and looks attractive. On the other hand, option 3 appears to be a clear loser. Option 1 is generally positive, but option 2 scores higher in every value.

Adapted from Hopf L & Welter W. Rethink, Reinvent, Reposition: 12 Strategies to Renew Your Business and Boost Your Bottom Line. Avon, MA: Adams Media, 2010. (Chapter 4 discusses the 7 attributes of a high quality decisions).

