Spiritual development in executive coaching

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Abstract

Purpose – Spiritual topics emerge in executive leadership coaching. However, the scholarly literature has emphasized the performance development aspects of executive coaching (EC) more than the development of executives' inner lives, although there is some evidence of practitioners addressing spiritual topics. Executive leaders have spiritual needs and executive coaches may be well positioned to address the intersection of the leaders' work and spiritual lives, provided coaches observe skill boundaries and the limitations of the coaching context. The purpose of this paper is to discuss the merits of including spiritual development (SDev) in EC and how executive coaches can incorporate it in their practice.

Design/methodology/approach – EC, SDev and spiritual direction are compared, drawing attention to conflicting and complementary aspects of SDev applied in EC. Organizations', clients' and coaches' likely concerns about such integration are explored and addressed. Suitable contexts, principles, a basic developmental framework and practical steps for executive coaches considering the inclusion of SDev in EC are proposed.

Findings – The paper provides coaches, consultants, executives and those charged with executive development with a foundational understanding of the role of SDev in EC.

Originality/value – A framework is provided for professionals involved in executive management development to address executive leaders' spiritual needs through EC.

Keywords Religion, Leadership, Management development, Coaching, Executives, Spirituality

Paper type Conceptual paper

Interest in the intersection of the spiritual and business domains has grown in recent decades (Benefiel *et al.*, 2014; Karakas, 2010), a trend ascribed to factors such as rapid and turbulent change in business and society, growing social consciousness (e.g. the triple bottom line or people, planet and profit), and the desire for spiritual fulfillment in an era of materialism (Chen and Sheng, 2013; Fry and Nisiewicz, 2013; Giacalone and Jurkiewicz, 2010). Executive leaders, like other workers, experience a spiritual aspect to their work and seek to understand and grow the spiritual facet of their lives (Delbecq, 2008).

The Pew Research Center (2017) found that 48 percent of Americans describe themselves as religious and spiritual, 27 percent were spiritual but not religious, 6 percent selected religious but not spiritual, and 18 percent selected neither religious or spiritual. Similar percentages are reported for other western countries (e.g. UK Office for National Statistics, 2012). Further, many leaders are religious or spiritual and their disposition to spirituality affects their work (Allen and Williams, 2017; Fairholm, 1996, Judge, 1999). Judge (1999) found that 73 percent of executives sampled ($N = 91$) "consider themselves to be strongly religious/spiritual" (p. 89). He also found that 30 percent of these executives were intrinsically "motivated by some inner connection to a higher power" (p. 88), while the remaining 70 percent were extrinsically motivated by social or worldly needs (e.g. prayer for protection).

Executive coaching (EC) has been recognized as a growing practice to support executive leaders in responding to change, preparing for individual transitions, developing particular skills or resolving identified interpersonal or performance-related problems (Athanasopoulou and Dopson, 2018; Gebhardt, 2016; Peltier, 2010; Shoukry and Cox, 2018). While empirical research on executives' desire to include a spiritual dimension in EC is largely absent from the scholarly literature, there is evidence that coaches have been applying a spiritual discourse to

their coaching work since at least the early 2000s (Dean and Meyer, 2002; Hall, 2019; Kilburg, 2004; Stern, 2004; Western, 2017). Brooks and Wright's (2007) systematic study with a small sample ($n = 59$) in New Zealand suggested a relatively low level of application of spiritual models (3.4 percent) in EC, with the greatest focus being on problem solving approaches. However, there is evidence that many leaders see connections between their spiritual lives and leadership (Allen and Williams, 2015, 2017; Judge, 1999). The positive response to including spirituality in executive education (e.g. Delbecq, 2000; Allen and Williams, 2015) further supports the view that including spiritual development (SDev) in EC is a valued option for some executives. Benson *et al.* (2003) provide a relevant definition of SDev:

> Spiritual development is the process of growing the intrinsic human capacity for self-transcendence, in which the self is embedded in something greater than the self, including the sacred. It is the developmental "engine" that propels the search for connectedness, meaning, purpose, and contribution. It is shaped both within and outside of religious traditions, beliefs, and practices. (pp. 205-206)

SDev in EC can further be defined as consensual interaction around spiritual topics and practices for the purpose of facilitating growth in the client's understanding and awareness of their spiritual self as a leader and whole person, and enhancing the client's spiritual inner life practice with the goal of enhancing the client's spiritual fulfillment and effectiveness as a leader. Spiritually and developmentally mature leadership (Harris *et al.*, 2019) expressed through hope, faith, altruistic love, joy, peace and serenity are potential products of spiritual leadership (Fry and Nisiewicz, 2013), which could be enhanced through engaging SDev in EC.

This paper explores the use of SDev in EC, including the need for a spiritual dimension to EC, the benefits and challenges of including SDev in EC, practical approaches to inclusion, and practice-related and ethical issues relevant to executive coaches, consultants, executive and organizational clients, and others involved in executive management development. Comparisons are made to the increasing inclusion of spiritual direction (SDir) in psychotherapy and counseling, drawing upon SDir as an ancient tradition of providing spiritual support to those seeking to develop spiritual aspects of their lives (Sperry, 2016). An argument is presented in favor of executives having access to skilled, knowledgeable and experienced coaches who can respond to the basic spiritual aspects of executives' lives (Allen and Williams, 2017; Delbecq, 2000, 2008), with potential for specialized support from more experienced executive coaches trained in SDev or through adjunctive support from an external spiritual director.

Executive coaching

EC is typically a paid-for professional service offered to executives and sponsored by the employing organization to assist executive leaders in developing and achieving personal and organizational performance outcomes. It may be combined with training, assessment (e.g. 360-degree feedback) and other interventions (Sperry, 2004) as a part of an organization's broader leadership development program. Peltier (2010) defines EC:

> Psychological skills and methods are employed in a one-on-one relationship to help someone become a more effective manager or leader. These skills are typically applied to specific present-moment work-related issues (than general personal problems or psychopathology) in a way that enables this client to incorporate them into his or her permanent management or leadership repertoire. (p. xxxi)

Page and de Haan (2014) more simply state, "Executive coaching is a form of organisational learning through one to one conversations that facilitates development for a leader" (p. 582).

EC is usually delivered through weekly consultations or meetings similar to counseling relationships where the coach listens, asks questions, gives advice, shares information, uses assessments (including observation), suggests readings or resources and applies other

interventions (e.g. role playing) to help the client to improve skills, knowledge and self-awareness, and to change behaviors. However, Hannafey and Vitulano (2013) emphasize that "Executive coaching is above all about relationships" (p. 599), explaining that coaching is typically contracted (in writing) for 6–12 months with reporting requirements to the employer and expectations that the coachee meet specific performance requirements.

EC has received considerable attention since the late 1990s and continues to grow as a profession and development practice (Page and de Haan, 2014; Shoukry and Cox, 2018). Coutu and Kauffman (2009) and Page and de Haan (2014) note that executive coaches around the turn of the twenty-first century were often hired to fix executives' toxic behavior, but 10–15 years later, receiving coaching was a sign of status, offered to developing high performers. There are numerous pathways to becoming a coach, including training programs, graduate degrees, professional registrations available after training and a period of supervised experience (e.g. International Coaching Federation), experience as an executive, migration from psychological practice (see Peltier, 2010) or simply through adopting the title on one's business card (as there are no barriers to claiming to be an executive coach).

Joo et al. (2012) suggest that approaches to EC generally fall between counseling and consulting, where counseling approaches focus on self-awareness and consulting approaches focus on learning. However, both approaches typically encourage "behavioral change, self-awareness, learning, and ultimately career success and organizational performance" (p. 468). Sperry (2004) notes that perspectives vary on whether EC is more about personal development ("being your best," personal well-being) or performance enhancement benefitting the organization. Shoukry and Cox (2018) highlight the instrumental nature of much coaching, focused on fixing problems and improving performance and impressions, suggesting that coaching should be reframed as more of a social process, noting the risks of coaching becoming a tool of social control (e.g. by corporations). Current trends suggest that coaching is increasingly focused on the client's agenda, self-actualization (over performance), internal standards (as opposed to meeting others' expectations) and capability development (Bachkirova et al., 2018). Where organizations support executives' personal development, especially well-being, SDev would seem to be a natural fit.

Page and de Haan (2014) summarized EC outcomes research stating, "Overall, outcomes research provides some indication that executive coaching is an effective intervention" (p. 584). The positive outcomes in measurable performance as well leaders', coaches' and organizations' impressions of the results (e.g. goal attainment, well-being and subordinate ratings) suggest that EC yields desirable benefits. Athanasopoulou and Dopson's (2018) recent review is more cautious, suggesting that evidence is not yet strong enough. They propose framing EC as a social rather than individual intervention where new meanings shaped by the social context are co-created by the organization, coach and client. This suggestion seems to invite a spiritual perspective to coaching, especially where leadership, meaning, values and worldview intersect. With the time pressures executives often face, as well as the vexing ethical and interpersonal dilemmas, and high need for self-awareness and self- management, SDev would seem like an appropriate focus in EC (Delbecq, 2000; Allen and Williams, 2017). This is especially valid if SDev in EC is a process that contributes to the positive shaping or construction of the executive's outlook, well-being and sustained performance through meeting SDev needs in a timely, personal and practical way.

Intersections of spiritual direction, spiritual development and executive coaching

Leaders have sought out spiritual counsel throughout the ages, sometimes only as the need arises, or through forming lasting relationships with friends, mentors, mystics or consultants (Western, 2017). It seems likely that some of the personal challenges and development that EC may target could relate to the individual's worldview and spiritual life.

Western's (2017) discourses of coaching recognize the role of the soul guide, acknowledging a long history of executive-level leaders seeking spiritual guidance and development. This seems especially relevant to the ethical dilemmas executives face, many of which are resolved through drawing upon spiritual, religious, and philosophical principles and traditions (Delbecq, 2006; Hall, 2019).

Religion and spirituality may also play an important role in executives' lives in guiding and sustaining them, especially under the pressure of their responsibilities (Benefiel, 2008; Delbecq, 2000, 2008; Judge, 1999). Western (2017) and Bachkirova (2011) highlight that executives might, at times, have spiritual experiences, interests and urges that they wish to bring to coaching. Incorporating SDev into EC seems appropriate when executive leaders expresses a desire to move beyond self-interest to connect with, and draw strength from, a Higher Power in their search for purpose and meaning, a supportive community, prosocial values to guide their leadership and life, and a source of strength and comfort during experiences of adversity (Allen and Williams, 2017; Barry and Connolly, 2009; Delbecq, 2013; Peterson and Seligman, 2004). This is consistent with the broader trend toward taking a whole person approach to work and adult education (Hicks, 2003; Jacobsen and Jacobsen, 2012; Miller, 2007; Miller and Ewest, 2015). It is also evident in process coaching models such as the Coaches Training Institutes' co-active coaching or Goals, Realities, Options, and Will model, with its emphasis on the whole person, intuition, fulfillment and deepening (Kimsey-House *et al.*, 2018). Western's (2017) soul guide and psy expert discourses similarly reflect this holistic approach, where the soul guide focuses on the inner life, authenticity and spiritual healing (including discovering meaning in life) and the psy expert's uses psychological tools to address the inner life and well-being of the client. Hall (2019) proposes that clients may wish to explore questions like "Who am I? […] Who am I becoming? […] Who am I intended to be?" (p. 402). An executive coach can also prompt clients to explore SDev as it relates to their work lives when identifying spiritual content or themes in conversations or as part of a broader exploration of the client's well-being (see "Leadership Formation as A Framework").

In this regard, the great religious and spiritual traditions depict SDev as a spiritual journey in which the sojourner ontologically becomes deeper and more integrated; a conversion from a false self trapped in fear, greed, resentment and distortion of reality to a true self steeped in forgiveness, acceptance, gratitude, compassion and integrity (Delbecq, 2010; Fry and Nisiewicz, 2013; Harris *et al.*, 2019; Kriger and Seng, 2005; Nouwen, 2010). This is a journey of transformation from ego-centered to other-centered while striving to attain and maintain a state of being or consciousness moment-to-moment that for leaders produces clear vision, risk taking and the ability to engage and enlist others. Further, in the spiritual journey leaders clarify what it means to live with meaning, what is the good life and how to live such a life (Western, 2017). Different models are represented in the literature for the leader's spiritual journey (e.g. Benefiel, 2008; Clinton, 1988; Fry and Kriger, 2009; Nouwen, 2006, 2010), but each results in the leader becoming more selfless and orientated to serving others, focusing on being over simply doing, being able to see and operationalize their organization's mission within a greater moral perspective, and experiencing a deeper sense of authenticity, purpose, meaning, connection (love) and transcendence.

Spiritual direction
Although receiving little emphasis in EC to date, SDir has seen increased interest in the psychology literature, including its role in mental health practices such as counseling and therapy, underpinned by the belief that engaging all aspects of a person in therapy may lead to better therapy outcomes (Riggs, 2006; Sperry, 2016). A spiritual director, also referred to as a spiritual guide, teacher, friend, counselor, advisor, Anam, Cara, Guru, Hashpa'ah, Mashpia or Murshid (in different religious traditions), is someone a person invites to hold him or her accountable for exercising the disciplines and practices of the spiritual life

(Nouwen, 2006; Abbott Tucker *et al.*, 2018). SDir is as old as the human race and has a long history in the Abrahamic and other major spiritual and religious traditions (Michael, 2004). SDir's primary emphasis is on facilitating SDev or growth (Sperry, 2013) and typically takes a form similar to coaching or therapy whereby the director listens to the directee, asks questions and gives guidance on SDev, including coaching directees on their spiritual practices, helping them discover gifts, exercising better discernment in decision making and exploring their relationship with their Higher Power. The connection to a Higher Power can, depending on one's beliefs, be grounded in a devotion to a God or gods, altruistic humanistic values, nature, the existence of a benevolent life-giving force, Divine Presence, True Light, Essence, Being, deep inner self or the "mystery that bears a thousand names" (Delbecq, 2010, p. 191; Fry and Nisiewicz, 2013; Sweeney and Fry, 2012). Valusek (2014) adds that SDir is increasingly embraced by the growing demographic of atheists who consider themselves spiritual but not religious and are seeking to discern the voice of their deep inner self.

Through SDir, awareness of being is framed in the context of seeking knowledge and wisdom from one's Higher Power, and acknowledging that such awareness and the ability to act on that awareness is attained through relationship with one's Higher Power, rather being a self-development path one can complete in isolation (Benefiel, 2005; Delbecq, 2008; Fry and Kriger, 2009; Nouwen, 2010). Central to SDir is the suggestion for the directee to engage in contemplative practices to foster conscious awareness (e.g. meditation, prayer, yoga, journaling, scriptural readings and walking in nature). This is essential for nurturing a spirituality that facilitates ever more refined programs of change and transformation that redefine the leader's individual and social identity through a discipline of constantly observing one's thought patterns and what one pays attention to in order to get the self-centered ego out of the way (Ruffing, 2000).

SDir in emphasizing the importance of the spiritual journey for SDev can also be beneficial for executives faced with significant personal trials, which spiritual directors often refer to as dark nights of the soul (e.g. Benefiel, 2008) in the Christian tradition, although similar concepts are evident in other beliefs systems (Meadow and Culligan, 1987). As the spiritual journey unfolds there emerges the state of being from which leaders find the courage to persist in the face of inevitable setbacks, detours and failures as well as a realization that leadership is a pilgrimage which may not provide enjoyment of the external fruits of success. It includes long periods of preparation and delayed gratification. In spiritual language, leaders experience dark nights of the soul though periods of lost connection, ultimately leading to being open to the mystery of suffering (Fry, 2019). These dark nights become the source for character and skills development that prepare leaders to better know themselves, compassionately identify with others, and initiate the efforts that become their leadership legacy. It is through this SDev that personal integration, authenticity, human concern and actions manifest that inspire others to join the leader in the search for complex solutions (Benefiel, 2008; May, 1992, 2004).

A spiritual director may also suggest that the executive should explore discernment practices that provide for additional moral criteria when assessing the "rightness" of decision alternatives. Discernment traditions believe that the spiritual has an important role in decision making and that prayer, meditative and contemplative practices can provide leaders with an inner freedom and greater openness and, ultimately, avoidance of the pitfalls that lead to strategic decision failure (Delbecq *et al.*, 2003; Fry, 2019). Leaders who incorporate spiritual discernment into their decision making often experience a better sense of their "true self": a rich source for the movement of spirit in their lives. They find new freedom, energy and needed resources to lead from a renewed sense of purpose in the face of daunting complexity and challenges. During the long process of engaging stakeholders in problem solving they return to prayer and meditative, mindful practice, holding this challenge in their heart, while experiencing the movements of desolation and consolation often inherent in the dark nights of

the soul, so often confronted when in discernment (Barry and Connolly, 2009; Ruffing, 2000; Sperry, 2013). Finally, leaders who incorporate discernment practices in decision making are more likely to avoid unwise actions, foster greater creativity and achieve greater commitment to decision implementation from others impacted by the decision.

SDir is, however, a unique profession requiring intense training, experience in receiving and giving SDir, supervision by other spiritual directors, consistent engagement in contemplative spiritual and inner life practices (e.g. prayer, meditation), extensive knowledge of one's religious, philosophical, or ethical tradition, orientation, or system, and commitment to one's own and others' spiritual journeys (Merton, 1987; Ruffing, 2000; Singh-Molares, 2017). Incorporating SDir into EC sets a very high bar for unique expertise in two professions and raises ethical and logistical challenges in actual EC practice such as payment of the coach and accountability to the sponsoring organization, confidentiality and tensions between the directee's beliefs and their organization. Seeking SDir privately as a more personal intervention may also be a more suitable option for executives seeking a deeper level of SDev. However, similar to psychotherapists who have incorporated elements of SDir into therapy (Sperry, 2013, 2016), there are opportunities to incorporate aspects of SDev into EC without extending into the typical depth of SDir. Ngunjiri *et al*'s (2016) and Miller and Ngunjiri's (2015) studies on leaders' and human resource managers' perceptions of workplace chaplaincy programs highlight the benefits of spiritual support in the workplace. In particular, EC provides a more private space to explore the topic of SDev, which might be less easily incorporated into management development workshops.

Contrasting spiritual direction and executive coaching
For the purpose of further clarifying how SDev and EC might intersect, a contrast is drawn between SDir, which primarily emphasizes SDev, and EC. Both SDir and EC share a degree of commonality in their methods and practice (e.g. listening, asking questions and confidentiality), although SDir tends to be more reflective and directors rarely take notes (May, 1992; Riggs, 2006; Sperry, 2004). The executive's well-being is an intended outcome for both SDir and EC participants; however, it may be secondary to improved performance of the executive leader or organizational unit in EC. In comparison, the goal of SDev is typically described as a spiritual journey where one seeks, sometimes with guidance of a spiritual director, a deepened spiritual life and more intimate relationship with a Higher Power (Barry, 1992; Edwards, 2001). The content of both practices is a central area of difference. While both might include skill development, the coach's and client's religious convictions or spiritual needs are often considered to be outside of EC's domain (Williams and Anderson, 2006) or even a potential source of conflict with the coach or organization (Iordanou *et al.*, 2017), especially within discourses that expect coaches to be neutral (Shoukry and Cox, 2018). However, the outcomes of EC and SDev are not independent of each other. Many executives seek to be more spiritually centered and present, and report being more effective in their leadership when they are centered and present (Allen and Williams, 2017; Bolman and Deal, 1995; Cashman, 2008; Delbecq, 1999, 2010; Ellman, 2001; Judge, 1999; Sperry, 2004). SDev's pre-modern focus on the leader being more than doing stands in contrast to EC focusing on modern obsessions with "achieving goals, aims and targets" (Western, 2017, p. 45).

Integrating spiritual development in executive coaching
Including a spiritual focus in EC raises numerous questions regarding ethical EC practice, particularly when a private corporation is sponsoring the coaching, when the coach and client differ in religion or worldview (Duncan, 2012; Iordanou *et al.*, 2017), or where the coach is unable to recognize their lack of preparation to engage in providing spiritual support (Western, 2017). Therefore, suitable contexts and practical guidelines for including a spiritual focus in EC are explored as a management or leadership development intervention.

As is common to any new profession, the EC field has worked hard to define its outcomes and uniqueness from other professions (Peltier, 2010; de Haan *et al.*, 2013), which has included the introduction of credentialing, certifications and ethical frameworks (e.g. Hannafey and Vitulano, 2013). An International Coaching Federation (2012) study found that untrained coaches were perceived as a threat to the profession. Various authors have therefore attempted to define the competencies needed to be a coach or the boundaries of the profession. In line with this perception, some authors (e.g. Iordanou *et al.*, 2017; Williams and Anderson, 2006) make specific suggestions about defining boundaries separating religious and spiritual issues from EC. Suggestions are also made that coaching is ultimately about the organization's bottom line and strategic objectives rather than the individual's growth or goals (Athanasopoulou and Dopson, 2018). However, other authors (Ellman, 2001; Western, 2017) more clearly acknowledge the potential role and benefits of spiritual and religious themes in coaching. It is therefore necessary to address suitable contexts for including spirituality and religion in coaching, as well as principles guiding its inclusion.

A context for inclusion
There are a number of potential conflicts created by including SDev in EC. Organizations may be reluctant to sponsor a religious or spiritual practice, although many appear to increasingly acknowledge the role of religion and spirituality in organizational life and there are numerous examples of organizations providing prayer rooms and meditation training and facilities (Fry and Nisiewicz, 2013). The workplace spirituality movement (Benefiel *et al.*, 2014; Karakas, 2010) is a testament to the strength of interest in the spiritual perspective. Organizations may steer away from religious or spiritual issues due to the taboo nature of the topic (e.g. Hicks, 2009), concerns around religious discrimination (Lund Dean *et al.*, 2014) and the desire to separate personal and business issues (Ewest, 2015).

In the US context, religious discrimination occurs when employees are treated unfavorably because of their religious beliefs (Title VII of the Civil Rights Act of 1965). The First Amendment to the US Constitution protects the right to the free exercise of religious expression. Similar protections exist in most developed and developing nations. These laws could be seen to be violated by an organization sponsoring EC that includes religious or spiritual dimensions if the organization were to subsequently take action (e.g. termination) that might be perceived to be based on religious or spiritual issues. However, organizations can forego any reporting requirements on spiritual or religious aspects of EC to avoid such problems. Similar confidentiality challenges are present with executive psychotherapy (Sperry, 2004) where an executive receives care from a qualified professional for dysfunctional workplace behavior. Organizations might also need to take care not to treat executives differently because of their faith or lack of faith.

Miller and Ewest (2015) highlight that some organizations operate under secularization theory, associating religion with harassment, fundamentalism and extremism. In this understanding, all religions and spiritualities are equally avoided rather than equally respected or accommodated. Supporting an executive's SDev might be seen as favoring the individual, his or her beliefs, or endorsing the individual's religious expression (e.g. proselytizing). Ewest (2015) highlights that much of corporate America is secularized, where religion is seen as taboo (Hicks, 2009). Delbecq expressed, "Business has been more successful than any other prior societal institution in creating intense mission-driven endeavors [...] [where] you don't know or care what a participant's religion is. You just want to work together in accomplishing the mission" (Allen and Williams, 2017, p. 220). For this reason, organizations may wish to actively avoid any entanglement in religious or spiritual issues.

While not a legal requirement, Hicks (2003) suggests that companies wishing to be respectful of the presence of multiple religions and spiritualities in the workplace should operate on a norm of nonestablishment, meaning "it is not morally acceptable for a company

to endorse, or in any way promote, one particular religious or spiritual worldview over others, even if that worldview if deemed 'generic' or is intended to apply to all employees" (p. 174). While the norms of American business may seem to discourage organizations' involvement in employees' religious or spiritual affairs, in reality this taboo seems more established on convenience, myth and ignorance. The spirituality at work movement has reminded organizations of the whole person view of employees (and executives) and the need to consider religion and spirituality as normal and important aspects of life (Benefiel *et al.*, 2014). In this context, supporting an executive's engagement in SDev as a part of company-sponsored coaching does not imply support for the individual's religion or any inappropriate religious expression. However, organizations might prefer to state this explicitly before engaging EC that includes SDev.

Miller and Ewest (2015) provide a framework for categorizing organizations based upon their view of religion and spirituality in the workplace, dividing organizations into faith avoiding, faith based, faith safe and faith friendly. Under the latter two categories, passively or actively supporting employees' SDev is seen as beneficial and in the mutual interest of employees and the organization. Faith-avoiding organizations (operating under the already discussed secularization theory), however, would presumably prefer to maintain a clear separation between professional and personal development (Ellman, 2001). In contrast, faith-based organizations would seem likely to support SDev being included in coaching when aligned with the institution's faith. Other than faith-avoiding organizations, many organizations would therefore be open to spiritual facets being included in EC.

Despite arguments that can made about spirituality and religion being a part of executives' lives and organizational life (Hicks, 2003, 2009; Miller, 2007), sceptics and those preferring a clear separation between EC and SDev will remain. However, accommodating both those who prefer inclusion and exclusion is possible, within certain principles.

Principles for inclusion of spiritual development in executive coaching
While spiritual and religious themes appear regularly in coaching (e.g. meaning, purpose and ethics), direct questions by the coach or client are needed before the topic becomes a focus in EC. André Delbecq tells of his experiences with executives asking him for help with the inner spiritual struggles implicit in their roles, during informal evening discussions at hotel bars after spending the day consulting to them on matters like decision making and innovation (Allen and Williams, 2017). A coach acknowledging or normalizing spiritual issues in EC may open the door to further inquiry to address an existing need. The secularization of many American organizations has reduced the normalcy of talking about faith and spirituality to the extent that an invitation may be needed, although some clients may speak openly on such matters without prompting. Peltier (2010) states that coaches must communicate the outcomes they offer to clients (e.g. improved leader-follower relationship) and spiritual outcomes could be included (e.g. being more centered, connected or aligned with one's calling). A coach including their training and experience in SDev in their promotional materials may prompt clients to speak about such issues. Table I provides examples of contexts where SDev might be included in EC, and lists appropriate practices. Some aspects were adapted from Riggs's (2006) discussion of ethical SDev in psychotherapy.

Leadership formation as a framework
Truly engaging SDev in EC requires a theoretical framework. Leadership formation is a form of SDev focusing on the vocational calling of an organizational leader in the context of an organizational mission (O'Connell and Shea, 2013). It aims at personal and organizational transformation. For example, in "The Soul of a Leader," Benefiel (2008) shares the stories of multiple executive leaders and their long-term leadership formation journeys, including the role of formal and informal spiritual guides or partners in this journey.

Delbecq's (2013) "The relationship between leadership development and leadership formation" emphasizes the difference between leadership development and leadership formation and the importance of the spiritual journey, contemplative practice, discernment, calling and dark nights of the soul to leadership formation (Fry, 2019). Leadership development emphasizes managerial and organizational abilities and skills contributing to effective leadership, often taught in business schools and workplace leadership training programs, which to date has been the primary focus of EC. In contrast, leadership formation focuses upon the SDev of the leader throughout their life including the discovery of their calling (Duffy and Dik, 2013), learning discernment in resolving deeply ethical situations with a high personal or stakeholder impact, establishing a deeper inner life based in contemplative practices (e.g. meditation, prayer and scriptural reading) and gaining perspective on one's life journey through time periods of both spiritual elation and desolation (e.g. dark nights of the soul, Benefiel, 2008). While some of this terminology emanates from Christian conceptualizations of leadership formation and SDir, similar concepts and practices are present in all the world's major religious and spiritual worldviews (Addison, 2000; Byrne, 1991; Marby, 2014; "What is spiritual direction?", n.d.b). With an understanding of different conceptualizations of the spiritual journey, the coach is able to recognize the essential patterns and struggles of SDev, and respond at a level appropriate to his or her competence, or refer the client to someone more able.

A basic progression can be identified for executive coaches to follow in integrating SDev in their EC practice, with the most common starting place for offering SDev in EC being exploration of one's own mindful or reflective practice. While there are no generally accepted qualifications that specifically prepare coaches for integrating spirituality into EC, experience in receiving spiritual coaching or guidance, honest self-reflection about one's own spiritual maturity with an experienced coach and the availability of another coach or spiritual director to provide mentorship might be suitable self-checks to apply before beginning SDev in EC (Western, 2017). Bachkirova *et al.* (2018) describe the transition in coaching from a traditional focus on the coach needing expertise or knowledge in a task, to a focus where the coach is an expert in a process. While this suggests that coaches who take a process approach should be capable of coaching clients on spiritual topics, we would argue that beyond a foundational level of encouraging a client through spiritual self-discovery and reflection, the intensity of SDir requires a higher level of training and experience in SDev relevant to the client's religious or spiritual tradition (Abbott Tucker *et al.*, 2018). To suggest that any coach with a knowledge of process is ready to provide SDev beyond a basic reflective level (Hall, 2019) risks touting generic, syncretic or commodified spirituality (Shoukry and Cox, 2018).

The transpersonal approach to coaching (Rowan, 2018), which also focuses on spiritual topics and levels of consciousness (Wilber, 2006) in coaching, attempts to disengage spiritual topics from religion. However, we argue that there is also a need to address the SDev needs of the many executives who identify with a religious tradition, as well as those who are not religious. In this argument, SDir is more similar to mentoring (Shoukry and Cox, 2018), in that its practitioners require a deeper knowledge and level of experience of spiritual journeys and practices. Therefore, there is a degree of complexity for coaches to consider in terms of the level of SDev services they wish to provide, which clients they may be capable of serving at different levels (e.g. depending on religious traditions), and what boundaries they wish to set.

Coaches might also prepare themselves to through exploring their own spiritual life, developing their spiritual inner life practice (including contemplative practices such as prayer, yoga or mindfulness) and becoming familiar with spiritual journeys and SDev through the lens of their own (and others') religion or worldview (e.g. completing a course in comparative religion). Benefiel (2008) and Clinton (1988) provide examples of the spiritual journey for leaders. After sufficient preparation, and a mentor to guide them, coaches can inform clients of their willingness and competence to engage spiritual themes in EC through their marketing materials or as the need presents itself in coaching.

Appropriate contexts and practices	Inappropriate contexts and practices
Practices	
Executive directly raises spiritual or religious questions or concerns, or the coach observes such themes and gains consent to focus on these issues	Coach uses spiritual or religious techniques or content without indicating their purpose or origins, including proselytizing, coercion or indoctrination (McCormick, 2006)
Coach indicates a background in SDev (including training or experience) during the contracting stage	
Coach indicates SDev as a potential outcome of EC in the contracting stage (e.g. centering, mindfulness, spiritual mediation, clarified sense of purpose, calling)	Sponsoring organization is not aware of spiritual or religious content being included during paid coaching time or a dual relationship
Sponsoring organization is made aware of or agrees to SDev being a part of a coach's approach (and/or SDev coaching time is billed separately or provided for free)	Failing to refer an executive to religious leaders or spiritual director where the nature of the issue requires it or where alternative support is available, practical and likely to be equally or more relevant or effective
An open conversation is held with all parties about including SDev, clarifying confidentiality and reporting, billing for time on spiritual topics, and conflicts of interest	Allowing a focus on spiritual issues to distract from the objectives of the EC or allowing a spiritual friendship that has formed to interfere with the professional relationship needed for coaching
Executive contracts privately with a coach who does not provide other services to the organization (avoiding a dual relationships)	
Contexts	
Organization is expressly faith and spirituality friendly, or faith based (Miller and Ewest, 2015)	Coach's worldview or religion is incompatible with the executive's worldview or religion and the coach is not able (interfaith skills) or willing to center interactions on the executive's worldview or religion
Organization has indicated support for the executive's SDev (without endorsing their religion or religious expression)	The coach is experiencing their own religious or spiritual crisis or lacks spiritual maturity
The coaching program is expressly aimed at personal development (e.g. self-awareness, work–life balance, overcoming a personal leadership crucible) (Thomas, 2008) where some confidentiality is expected	The coach is not trained or experienced in SDev or SDir at the level required (Riggs, 2006), or lacks awareness of appropriate boundaries of their role
Applying evidence-based generic SDev practices (e.g. meditation, visioneering, goal setting) that have been shown to benefit executives and professionals	The coach is not qualified or ordained in the executive's religion which has limiting rules or norms on who has religious authority (e.g. taking confession) (Riggs, 2006)
The coach is respectful of client's faith (or lack of faith) and choices, and has the necessary knowledge and experience related to the client's religion or worldview, comparative religion, interfaith practices, contemplative practices and spiritual history taking or assessment	There are pending charges or grievances against the executive relating to religious matters (e.g. discrimination)
	The organization is faith avoiding (Miller and Ewest, 2015) or is faith based in different religion from the coach
The coach has sufficient independence from the organization to main confidentiality and perspective	The executive is not religious or spiritual and prefers to avoid these issues

Table I.
Where spiritual development might be included in executive coaching

Spiritual assessment

One starting place for engaging spiritual themes in coaching is a spiritual assessment. Spiritual assessment has been developing in nursing practice for decades (Stoll, 1979; McSherry and Ross, 2002; O'Brein, 2018), as well as in psychotherapy as part of the intake process (Sperry, 2003). The goal of a spiritual assessment is to briefly assess the client's spiritual history, current state of well-being and spiritual needs, providing the coach with a sense of spirituality's centrality in the client's life, assisting with referrals to other professionals or institutions where support might be provided, and aiding the client in reflecting on their own position in life and what their needs might be. It may also help to determine if the coach and client are a good fit for engaging in the SDev process given their individual worldviews and the demands of the contracted EC program. Various themes are

evident in spiritual assessments (McSherry and Ross, 2002; O'Brein, 2018); however, O'Brien's (2018) personal faith, religious practice and spiritual contentment represent the predominant themes in such assessments. Sources of spiritual support and relationships between leadership and spirituality (adapted from Stoll, 1979) are appropriate additions for the EC context. In Table II, an example is provided of what a spiritual assessment interview might include. This can be supplemented with taking a spiritual history about the "directees' religious upbringing, their images of God, [and] their basic values and beliefs" (Sperry, 2003, p. 6). The initiation of such an assessment might be best after initial rapport is created, when urgent performance-related issues are being addressed, or when spiritual themes begin to emerge. Supplementary assessment with tools like the Enneagram (Hall, 2019) has also been found useful for SDev in coaching.

The assessment concludes with a discussion on moving forward with spiritual and religious themes in EC. This is a departure point for further conversation. In the authors' experience, some clients show interest in this topic immediately, some come back to it later on their own and others prefer to define the coaching relationship more narrowly. Consistent with the trend toward client-centered coaching (Bachkirova et al., 2018), it is essential that such inclusion be guided by the clients' needs and interests, more than the coach's enthusiasm for a new technique or hammer looking for a nail (Berglas, 2002). The initiation of the spiritual assessment process and agreeing to further engage this topic in EC also depends on the sponsoring organization's views or preferences.

Ongoing process

After the initial assessment, the SDev in EC process is shaped by the clients' needs. While SDev within EC might not always allow for the depth and frequency of SDev supported in an SDir relationship, there may be opportunities to focus part of some sessions on SDev-related issues or handle them as they arise. There is no prescription for what this process might look like; however, similar to the typical processes of EC, the coach can listen, ask questions, share resources, teach skills, monitor and reflect on progress, refer the client

Theme	Question or statement
Introduction	This series of questions is intended to explore your overall spiritual well-being and the role of religion and spirituality in your life as a leader. Many leaders report that their leadership, religion and spirituality are connected. We can skip any questions you prefer not to answer, and your responses are confidential
Personal faith	Is there a Higher Power, such as God or another divine force or being that you believe in? What would you describe as your religion or spiritual beliefs?
	Do you consider yourself to be a spiritual person? Explain
Religious practice	Are you a member of formal or informal religious organization? Tell me more about your participation
	Do you regularly engage in any type of spiritual or religious activity? Elaborate
Spiritual contentment	Do you feel at peace with your Higher Power or God? Explain
	Are you content with your spiritual life and does it support you in the way you would like it to?
Sources of spiritual support	Is there a person or group that you turn to for spiritual support? Explain
	Are you satisfied with the sources of spiritual support you have?
Leadership and spirituality	Does your leadership role have spiritual or religious significance to you? Explain
	Do you see any parallels in your growth as a leader and as a spiritual or religious person?
Conclusion	Based upon what we have discussed, what are your perceptions about the relevance of religion and spirituality to your executive coaching?
	If you would like to include spiritual and religious issues in your coaching, what are your expectations for this aspect of the coaching?

Table II.
A sample spiritual assessment for use in executive coaching

to external resources, use self-assessment tools, engage the client in spiritual practices such as discernment, prayer or meditation if needed, and even determine when to terminate the relationship. Consistent with most spiritual traditions, it also valuable for clients to be connected to a broader spiritual community (Hall, 2019). It is important that coaches remain cognizant of the limits of their own skills, be willing to refer clients to experts, avoid seeking guru status with clients and recognize that EC interventions, along with SDev in EC, are typically short- to medium-term interventions (Western, 2017).

Conclusion

It may be easier to suggest that EC and SDev should remain separate practices, but there is hope that SDev, if judiciously applied, can be included in EC. Separating the practices may not ensure better coaching outcomes for executives. Comparisons were made between SDev, SDir and EC, indicating areas of commonality and conflict, as well as areas where the practices may complement each other. Organizations', clients' and coaches' likely concerns about such an integration were addressed. Suitable contexts, principles, a basic developmental framework and steps for executive coaches considering the inclusion and practice of SDev in EC were presented.

Agreeing with Athanasopoulou and Dopson's (2018) view that EC is a social intervention where new meanings shaped by the social context are co-created, supporting arguments were presented that spiritual aspect of leaders' lives being relevant to EC. Training and preparation are needed to minimize harm and maximize the positive outcomes of SDev in EC, but ultimately those practicing SDev in EC are human and fallible, and supporting others in this way (even imperfectly) is a meaningful and noble purpose. In conclusion, people experience a spiritual journey in life and need support – executive leaders are no exception and may in fact need unique support and development.

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