

What is good practice with regard to information holding and note-taking in coaching?

As you are aware coaching is an unregulated profession; there are no mandated rules on this. Best practice is debated - things to consider are your ethical framework, what you have contracted with your coachee, what your insurance provider says, GDPR, what your coaching body (EMCC, ICF, AC etc) says if you belong to one.

A common form of practice is to consider two strands of information:

- ✓ one is factual content, recorded on a contact sheet to remind you of key facts shared by your coaching client e.g. speciality, stage of training, partner, children. Should you wish, this can be recorded on Mentornet. Note you do not record any impressions, perspectives, or opinions here.
- ✓ the other form of information is purely for your own development as a coach and for your supervision. This usually takes the form of anonymised reflective notes written up after your sessions. These notes would not hold any information that could identify your coaching client.

Any information you choose to hold will need to observe data protection responsibilities according to GDPR, e.g., ensure that information you keep is password protected, kept on a secure server, or kept under lock and key. If you do make notes, you should consider how long you keep them for and may need to take advice from your insurance provider. A common practice is to stipulate a timeframe after coaching is completed when you will destroy them, and contract for this at the outset of your coaching relationship.

Do I need indemnity for my coaching?

You should let your defence organisation know you undertake coaching so they have a full description of your professional roles and responsibilities. If you are no longer in clinical practice/with a defence organisation then you may wish to consider professional liability insurance for coaching from a market provider eg, see [this from EMCC](#).