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COACHING GUIDE

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COACHING GUIDE

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This handbook provides information for those who coach as well as those who want to be coached or are being coached.

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Section 1

General Information

Aim

This guide aims to introduce and explain coaching and how it can be used as a support to the learning and development of an individual, in line with their personal and organisational objectives.

Definition of Coaching

A confidential one-to-one relationship in which an individual uses the skills of a coach to work through issues in a structured way to find an outcome or solution. It is a protected, non-judgmental relationship, which facilitates a wide range of learning, experimentation and development. It is built on mutual regard, trust and respect.

"Coaching is unlocking a person's potential to maximize their own performance. It is helping them to learn rather than teaching them".
Timothy Gallwey (1975)

Benefits

There can be tangible benefits for both the individual and their organisation. The individual can learn to better solve their own problems, improve their managerial or leadership skills, improve relationships with others, learn how to reflect and develop themselves, become more confident, a better performer, have greater insight into themselves and gain new perspectives, acquire new skills and abilities, develop adaptability, improve work-life balance and reduce stress.

As a result of effective coaching, the organisation could see increased productivity and improvement, as well as a more engaged employee – reflecting an organisation committed to developing its employees and making the best of their skills. It could see newly promoted/appointed employees better able, more quickly, to embrace their role and new responsibilities. Coaching can also help the employee deal with personal issues which could be impacting on performance at work.

Coaching can be very helpful at time of organisational change, helping to move forward a change agenda across an organisation. Coaching is also seen as a very effective support to other training and development initiatives, helping individuals reflect on and reinforce their learning.

What is the relationship between Coaching, Mentoring and Therapy?

Coaching and mentoring are not 'therapy'. Though the key theoretical underpinnings, models and techniques found their origins in the field of psychology and associated

therapies like gestalt and cognitive behavioural therapy (which have broad ranging applications in both organisational and personal contexts).

The key difference between coaching and the therapies is that coaching does not seek to resolve the deeper underlying issues that are the cause of serious problems like poor motivation, seriously low self-esteem and poor job performance. In a work context, coaching and mentoring programmes are generally more concerned with the practical issues of setting goals and achieving results within specific time-scales.

Coaching or mentoring is generally commenced on the premise that clients are self-aware and resourceful and have selected coaching or mentoring because they do not require a therapeutic intervention. It is possible for someone who has underlying issues to experience success within a coaching context even if the underlying issues are not resolved. If, however, a client becomes 'stuck' and the coaching or mentoring programme is not achieving the desired results, then a psychological or therapeutic intervention may be necessary for the client to move forward and achieve their goals, but this is rare.

It is very important that a coach or mentor does not stray into the preserve of the counsellor or therapist and maintains an ethical approach to dealing with a client who may benefit from the services of a professional trained specifically to deal with these issues. Client progress is always monitored and coaches and mentors watch for signs which may indicate that a client requires an assessment by a trained therapist. Some coaches will on-refer a client to an appropriate therapist if this is felt to be useful. Other coaches will conduct a coaching programme in parallel with a therapeutic intervention if the coachee feels this is what's best for them. Most coaches and mentors are keen to maintain professional boundaries and will collaborate with therapists when a client requires both forms of intervention.

Therapy or counselling is aimed at life improvement or enhancement. It is about helping people understand the cause of their negative beliefs and behaviour and breaking free from problems and issues that have held them back and prevented them from getting all they can from their lives. Some professional coaches are also trained in counselling but if they feel counselling is more appropriate than coaching, they will make a distinction between the two interventions and always undertake a proper therapeutic assessment. It is advisable not to work concurrently as both coach and counsellor with the same individual.

How does Coaching compare with other services?

There are a number of interventions (some of which have been touched on briefly already) which are used in organisational settings and which can be used in tandem with coaching, or for which coaching might be, in the right circumstances, considered as a preferred alternative. The following offers a simple illustration of how these can differ, along with a table which explains the differences in more detail.

- **Mentors** say: Let me show you the ropes
  Coaches assist beyond corporate ladders and work with the "whole" person
- **Trainers** say: Here's how to do it
  Coaches assure you master that knowledge or skill
- **Consultants** say: Here's the solution
  Coaches help you to find your own solutions and assure you follow through and deliver

- **Therapists** say: Here's why you're doing it
  Coaches focus on what's right about you and how to move forward by adopting more constructive behaviours

Definitions and Differences between Coach, Mentor, Trainer, Consultant, and Therapist

	Coach	Mentor	Trainer	Consultant	Therapist
Roles	Partner and Advocate	Teacher and Guide	Teacher, Expert, Guide	Advisor, Expert, and Guide	Counsellor and Therapist
Authority	Client	Mentor / Mentee	Trainer	Consultant	Counsellor
Uses	Curiosity, facilitation and support, coaching models	Experience, self-proven methods, contacts	Models, methods, procedures	Expertise experience	Healing methods, clinical models
Purpose	To partner with the client in clarifying, aligning, and achieving goals, while championing who the client is at their core	To teach the client the Mentor's methods and open doors that have led to success	To teach the client skills, procedures, methods, expertise, etc. To develop skill and proficiency in an area of an endeavour	To advise client and provide with success strategies	To assist the client in healing traumas from the past
Client Objective	To connect with their deepest values and desires and to create their own guiding principles and model of success	To understand and use the Mentor's methods of success and contacts	To develop skill and proficiency in an area of an endeavour	To use the advice, expertise, and strategies for success	To release the past and/or have better coping skills
Desired Result	Personal alignment and profound change	Increased success by implementin g the Mentor's approach and contacts	Increased or improved ability and proficiency	Using the consultant's advice	Emotional healing through clinical models

Source: The Coach Mentoring Group (see - www.coachmentoring.com).

BENEFITS OF COACHING IN ORGANISATIONS

Growth of Coaching in Organisations

Coaching is becoming an increasingly popular as a means of promoting learning and development, according to the Chartered Institute of Personnel and Development (CIPD)'s learning and development surveys over the last couple of years.

The 2008 survey indicated that almost three-quarters (71%) of UK employers currently use coaching in their organisations, compared to 63% in the 2007 survey and a similar proportion (72%) of respondents find coaching to be an effective tool.

Initial findings from the 2009 survey indicate that over two-thirds (69%) of respondents use coaching within their organisations. Public sector (78%) and larger organisations with more than 5,000 employees (83%) are most likely to use coaching.

The survey also indicates that coaching appears to have forged closer links with management development over the last year. Fifty-five per cent of respondents agree that coaching is part of management development initiatives in their organisation, an increase of 8% on the last survey. Despite this, only 25% of respondents agree that coaching is the predominant management style within their organisation.

While coaching may not be seen as a particularly formal process (only 36% say that in-depth training is provided to coaches), it is viewed positively by many. Fifty-seven per cent agree that being a coachee is encouraged, and 62% feel that coaching is seen primarily as a positive development opportunity rather than a remedial intervention.

Coaching and Training

As early as 1997, a study resulted in an often-quoted statistic that: "After training alone, the average increase in productivity was 22.4%. When training was augmented by coaching, the average increase in productivity was 88.0%." This study examined the effects on productivity of one-on-one executive coaching in a public sector municipal agency in the United States.

Why Coaching Works

People seek statistics on the benefits of coaching and why it 'works' (whatever the term might mean to them). You have to find out first what an organisation or individual wants, why and how and where they are now, before you can predict the gains. And of course, by then quite a bit of the coaching has been done: so it's hard to measure…

CIPD produced a report for their 2005 Coaching at Work conference called *"Does Coaching Work?"* This report gave the findings of an exercise undertaken by CIPD and published in their book, "The Case for Coaching: Making evidence-based decisions on coaching". Around 30 organisations that had introduced coaching agreed to share their experiences with CIPD for the purposes of the project. Given the relative scarcity of research about the impact of coaching in business settings, their data proved to be a valuable mine of information about UK organisations' experiences and use of coaching. These organisations reported the following examples of results seen from the use of coaching:

Performance
• Improved performance by the individual and the team
• Less 'human' errors and thus less time spent correcting work and/or mitigating the effects of incorrect actions
• Increase in visible performance noted by line manager or coachee
• A decrease in managerial time required to monitor and check team members' work due to increased confidence in the individuals' performance

Confidence and motivation
• Individuals have become more proactive as their confidence levels increase
• Improved confidence and performance at work
• Early feedback is mainly positive. Those being coached are motivated by the levels of support provided and attitudes towards self-directed progress are enhanced

Behaviour change
• Re-engagement with role and organisation, greater clarity and perspective, increased proactivity and capacity for addressing issues, increased confidence, greater awareness of management/leadership styles, more effective management of challenging people and greater awareness of career options and choices
• Change in some managers' work styles – higher commitment and more focused on actions
• Behavioural changes in targeted individuals – improved performance in specific areas
• There have been behavioural changes such as leadership development, confidence, resilience and greater coaching skills

Culture
• Increased two-way communication
• Improved employee engagement scores
• Achieving IIP status from zero starting point within 12 months
• Surveys indicated organisational values are better embedded
• Results seen so far include benefits for the coachee, such as improved relationships, promotion, greater responsibility and new roles

Leadership
• More confident and effective leadership being demonstrated
• Improved leadership from team-leader level
• Decision speed improved at senior levels
• Management committee and general managers 'singing from the same song sheet'
• Improvements in confidence and motivation among the individuals being coached and a general impression from line managers that the individuals are more engaged and enthusiastic in their day-to-day work

Source: CIPD www.cipd.co.uk

The Coaching Relationship

Coachees can expect that their coach will…

- Actively listen to what they have to say and be non-judgemental
- Keep discussions and any materials confidential, unless both parties agree otherwise.
- Inspire them with the will and motivation to pull them toward finding their own solutions.

- Act as a sounding board for their thoughts and ideas encourage the refinement of their strategic thinking and support them in solving business problems.
- Encourage them to think about the bigger picture of their career development and personal development.
- Provide honest, accurate and constructive feedback.
- Fully utilise their skills, knowledge and experience (wisdom).
- Be open about their own learning and development, including as a skilled coach.
- Make every effort to be available for pre-arranged meetings, and other pre-arranged contact. Act quickly should there be a need to rearrange a session
- Constructively challenge the coachee's self limiting beliefs and perspectives
- Help the coach fully explore the range of options available to them in addressing any issue
- Where particular skills are needed, help the coachee identify how best to achieve these

Coachees cannot expect…

- That their coach will solve a problem for them
- That their coach will do their work for them or arrange to have it done for them.
- That their coach will interfere with the Coach's Line Manager or chain of command.
- That their coach will interfere in any disciplinary matters concerning the coachee.
- That they will be "fast-tracked" into jobs ahead of other potential candidates.
- That the coach will never have to reschedule a meeting.

Contracting

The coach and coachee agree ground rules, identify goals to work on plus desired outcomes at the start of the relationship and build these into a contract which can be referred back to and reviewed as part of the coaching relationship.

Planning

The coach and coachee have a responsibility for planning and using the meeting time effectively. The use of written notes, pre-agreed agendas and other written stimulus to help plan meetings is entirely down to mutual agreement.

Action

Both coach and coachee should commit to carrying out any agreed actions from their meetings. Only if the coachee agrees specifically should the "action plan" be referred to any other party for any purpose.

Feedback

During the coaching period, the coachee can expect to receive feedback from the coach, which could be observational feedback about perceived patterns of behaviour, reactions to events or people, or how far they might have moved forward as a result of any actions. This must be delivered in a constructive manner; i.e. only feedback that actively helps the individual to improve should be given.

The coach should be prepared to ask for and receive feedback from the coachee as part of their learning about how they can improve the support they are providing.

Confidentiality

The coach and coachee should reach an agreement on confidentiality such that all discussions between them are considered confidential. Any disclosure of the content of their discussions should only occur by agreement of both parties. PSMW recommends adherence to the European Mentoring and Coaching Council (EMCC)'s Code, which outlines good ethical practice. Alternatively, the International Coach Federation (ICF) provides a Code of Ethics.

EMCC website - http://www.emccouncil.org/

ICF website - http://www.coachfederation.org/

Listening

The coach and coachee should each ensure that they take the time to listen to the other and fully understand each other's position before they contribute. Active listening is one of the Coach's most important skills as they need to understand the coachee's position and be able to play back information to the individual.

No Fault "Divorce"

Effective coaching relies on the formation of a good relationship between Coach and coachee. If either party finds the relationship is not delivering its purpose or seems unrewarding in some way, this should be raised openly, discussed and if agreed, both parties should look to end the relationship.

Meeting Frequency, Duration and Venue

The coachee and coach should adopt their own arrangements for meeting within the following guidelines:

- Each coaching relationship would usually start with an introductory meeting to ensure that both parties are comfortable to proceed. This is generally done face to face, somewhere safe and neutral for both parties, though telephone contact can also be used where distance is an issue.

- A suggestion would be to start with 3 firm meetings in the diary with a review at that stage and the option to have 2 to 3 more sessions if need be.

- Depending on the particular needs of the coachee, there may be a need to meet fortnightly or monthly, and again this would best be agreed up front at contracting stage.

- Some coaching relationships are more ad hoc, which can work depending on circumstances of coachee, however the regularity of the meetings is important to help move the coachee forward

- Coaching interventions as a general rule, can be extremely effective even when very short and focussed; the length of sessions will depend on the coach's preferred

method of working and what suits the coachee. As a guide, sessions are generally between 45 minutes and 2 hours in duration.

Coaching and the Line Management Function

Though the coach will provide support to the coachee, this is in *addition* to that provided by the coachee's own line management.

Using Three Way Contracting

Though some coachees may approach coaches direct for coaching, line managers or a representative from the organisation may be an integral part of the relationship too. Coachees are encouraged to involve their line managers in the process, in agreeing goals and desired outcomes and engaging in 3-way contracting. Establishing 3-way contracting is helpful to establish a clear and transparent relationship and dialogue between all three parties, also ensuring that the potential benefits of coaching are maximised for both the coachee and organisation..

Not all coachees may feel comfortable in working with this approach and if that is the case, the usual 1:1 contract can apply, although progress towards securing a 3-way dialogue should be the aim.

Section 2

The Coach's Guide

Role of the Coach

The coach will use their skills and a range of practical tools and techniques to help the coachee work through an issue, in a structured way. Helping to foster a safe environment to share, they will act as a sounding board for ideas. They will also help the coachee focus on a way forward, always looking towards a solution or actions for the future, helping them to fulfil their potential or meet their goals.

Coaches can use a range of skills and a wealth of expertise during a coaching session.

Active listening skills

Active listening is a structured way of listening and responding to others and in the case of coaching, focussing the attention specifically on the coachee. In order to do this effectively, the coach needs to suspend their own frame of reference and judgement, fully concentrating on what the coachee has to say.

The skilled coach will observe the other person's behaviour and body language. Being able to interpret this successfully, allows them to develop a more accurate understanding of the coachee's words. On hearing what the coachee has to say, the Coach may then paraphrase their words and play them back.

It is important to note that the listener is not necessarily agreeing with what the coachee has to say, but is often simply stating what was said. In situations where there is a great deal of emotion, the listener may listen for feelings. Therefore, rather than just repeating the coachee's words, the active listener might describe the underlying emotion e.g." you seem to feel angry" or "you seem to feel frustrated".

Questioning skills

A good question can help bring clarity for the coachee around their situation (this can sometimes be described as a "light bulb moment"). Effective questioning can quickly draw a coachee to make sense of an issue or situation which previously seemed complicated or of no sense at all. The most powerful questions are short and focussed, getting to the heart of the issue and producing a real shift in the coachee as they experience their own situation reflected back to them – maybe for the first time.

A coach will use a range of questions – open to encourage an answer and dialogue and possibly closed to clarify a "yes" or "no" situation.

Summarising

Fitting in with active listening and paraphrasing, the coach will often summarise the coachee's situation as explained by them, back to them. This enables the coach to check their understanding of the situation but also can bring real clarity to the coachee.

Challenging

Effective coaching also contains an element of challenge – it should not just be seen as a "cosy chat". It is an opportunity for the coachee to be taken out of their comfort zone, within a "safe" environment. The coach can agree the level of challenge with the coachee up front and explain the purpose of it within the coaching relationship. A coach may challenge ideas or perspectives and self limiting beliefs, asking the coachee for evidence for feeling the way they do. It can make them challenge the way they see themselves, their organisations and their relations with colleagues. If a coachee is feeling uncomfortable by a challenge, it is possible that they are gaining insight about themselves and however painful this might be to recognise, it could be key to them moving forward.

Providing Feedback

It is often said that coaches should act like a mirror, reflecting back observations and their coachee's words and behaviours. The coach also has a role in providing *constructive* feedback to the coachee. This could be around patterns of behaviour, their perceived emotions or progress and achievements. The key to the feedback is that is given with the aim of benefiting the coachee, covering the positives as well any developmental needs the coachee identifies or reveals.

Hints and Tips

- Take your diary along, agree and book at least a few of your coaching sessions at the first meeting.
- Ensure that the time is uninterrupted – if possible agree somewhere to meet away from your workplace.
- Clearly explain and agree any preparation for each meeting, review any actions at the next session.
- Be open to new things and experiences too – this is not just something the coachee can benefit from.
- Contract clearly and outline roles and responsibilities at the outset of the relationship – this is something you can always review and draw the coachee back to, should you need to.
- Clarify the desired outcomes the coachee wants to achieve – be *really* clear because this will make a huge difference to the effectiveness of the coaching and the benefits the coachee desires.

Encourage Self Coaching

Encourage the coachee to own their issues and their own development. To help support them feeling able to be in control of their own destiny, a good coach will share the range of models and theories with their coachee, helping them learn self coaching skills, improving their reflective skills, increasing independence, self-confidence and drive to improve.

Avoid the coachee becoming dependent on you from the outset by clearly outlining both of your responsibilities in the coaching relationship and by helping them come to their own conclusions, solve their own problems and find their own solutions. Depending on your personal expertise, a coachee may ask for your advice from time to time. There is no problem in giving advice on this basis, but you should remember that the coach's role is not to mentor. So, if asked for advice, make it clear that you are taking off your "coach" hat, provide the advice or share your experience, but then be clear when you revert back to your coach role again.

Open Up Areas for Development

Most people will demonstrate only their strengths to their manager and not readily admit to areas where they may not be as strong. Because the coach is outside the line management situation, the coachee may open up more to a coach, leading to the potential to develop areas that may be both hidden and holding the coachee back from reaching their full potential.

Meeting Preparation

Have an introductory session with the coachee. This will enable you to assess

- Their understanding of coaching
- Whether they need coaching or some other from of intervention or support
- Whether you can help them or whether someone else is better able to support them
- Whether you both want to work together and feel comfortable with each other

In addition, you can set ground rules, future sessions and work through your contracting.

It should also help to establish the relationship, building rapport between both parties so coach and coachee can concentrate on the coachee's issues at the first session.

Time and Venue

Allocate sufficient time away from any interruptions in a comfortable location. For the first meeting of coach and coachee, it is useful to meet somewhere where both parties feel comfortable and safe.

Contracting

You and your coachee need to agree ground rules and identify goals to work on plus desired outcomes at the start of the relationship and ensure that they are built into a contract.

A sample contract can be drawn up to embody these agreements. You will find a template for a 1:1 contract (coach and coachee) at Annex B of this guide. You will also note there is a template for a Three Way Contract (which would apply where an organisational sponsor is also involved in the coaching arrangements) at Annex D. The agreed contract can be reviewed and amended if need be, but it is important to secure the commitment of both (or all three) parties at the outset. In the case of three way contracts or where an organisation has set up the coaching, any requirement to feedback must be agreed before the coaching starts and will full involvement and agreement of the coachee.

Sample Agenda for Introductory Session

Although coaching meetings are not meant to be highly formal, they tend to be more effective if there is some element of structure to them. It is possible to cover some of this introductory meeting using the telephone, if there are distance issues, but face to face contact is preferred to help build rapport and establish the relationship.

- Introductions
- Explain who you are, your experience as a coach and your background
- Ask them about themselves – who are they and where they sit in their organisation
- Check coachee's aims and what they hope to get out of a coaching relationship
- Assure about confidentiality and refer to the ethics of coaching – the European Mentoring and Coaching Code of ethics is a good reference as is the International Coaching Federation
- Explain what a coaching session is and how it differs from mentoring and other interventions
- Talk them through both the role of the coach and coachee and check understanding and expectations of coaching
- Check to see if coachee is happy to proceed with you as coach and reflect on whether you feel you can coach them. If there is agreement on both sides to progress coaching, both parties need to agree the ground rules and sign a contract to show commitment to the coaching relationship
- Clarify and agree any actions to be completed by the next meeting.
- Agree date a place of next meeting, and an outline "agenda" you want to set.

Goal Setting

The coachee's goals need to be discussed at the outset; otherwise the relationship may lack focus and direction. There are a range of different coaching models which can help clarify aims, objectives and help the coachee to plan.
One of the simplest and most popular models used within the Welsh public service is Whitmore's GROW model (see Annex I). This model works through four stages – Goal (look at topic, objective, aims of session), Reality (main discussion of where they are now, what the issues are), Options (coachee puts forward options, Coach clarifies/questions/challenges until the choice (the best choice) is made, Wrap Up/Way Forward (where the coachee commits to an action or actions in a specific and measurable way). During a coaching session, coach and coachee may jump to and from steps just to ensure that situation and possible options are fully covered.

Another useful coaching model is "OSCAR" (see Annex J) which has been produced by Worth Consulting http://www.worthconsulting.co.uk

Reflection

Reflection and review are important parts of learning which many busy people do not make time for. Build in some time from the beginning for the coachee to reflect on what she/he gained from the session, what was useful and what was less so. You may also like to share what you have gained.

Coachees may also benefit from using some type of Learning Log to capture their thoughts and reflections. This could be a tangible book or journal, or an electronic journal.

An example of a simple learning log is attached at for the coach is attached at Annex E and the coachee at Annex F.

Regular Coaching Sessions

A "typical" structure for future coaching sessions could be:

- Review the ground rules and contract.
- Review any agreed objectives/actions from last meeting.
- Review Coachee's personal action plan, objectives and progress against these.
- General but focussed discussion about progress/career/experiences since last meeting. Include real work situations, issues and any problems.
- Use a coaching model plus tools and techniques to help Coachee work through identifying a goal to work on during the session to identify an action plan ad move forward.
- Agreeing outcomes and any preparatory work before next meeting.
- Set/confirm date for next session, time and venue.
- Give (or send electronically) coaching session summary form (see example at Annex D) which helps to identify actions of Coach and Coachee.

Ending the Relationship

As the coachee needs less and less support/becomes increasingly self-reliant there may be no further need to meet. If the relationship is not working, you do not have the expertise to help, or there is no more for the coachee to gain from it – close it down without fault or blame. If you do not feel you have the expertise to help them any further, you may be able to refer them to another coach who can.

Coaching Supervision

With the increase in coaching across public services, comes an increased need to ensure that coaches are supported to grow and develop in this role over time. Coaching supervision is a key to help manage this and provide quality assurance of coaching as well as development of good professional practice within the coaching community.

Coaching supervision is still a relatively new activity, defined as a *"formal process of professional support, which ensures continuing development of the coach and effectiveness of his/her coaching practice through interactive reflection, interpretative evaluation and the sharing of expertise"* (Bachkirova, Stevens and Willis, 2005).

There are a number of definitions of supervision but there is common agreement described as follows in the CIPD report *"Coaching Supervision: Maximising the Potential of Coaching"*:

- Supervision is a formal process.
- It is interpersonal, and can be undertaken one-to-one, in groups or in peer groups.
- Reflection on client work is central to supervision.
- Its goals include developing greater coaching competence.

Supervisors are professionally qualified coaches who, as well as having a great deal of expertise and coaching practice under their belts, have undertaken a specific supervision or training qualification. A great deal of supervisors will offer supervision on a one to one basis, whilst others are well practised in group supervision, using action learning set techniques to deal with issues and share good practice. It is generally recommended that coaches get around one hour of supervision to every ten hours of coaching.

Hints and Tips

- However difficult it can be, hold back from offering advice and continue working with the coachee so that they can find their own solutions

- Don't be afraid of silence, even if it feels a little uncomfortable! It gives people time to pause and reflect and can prompt them to voice their thoughts and feelings

- Make best use of your communication skills from the outset to build rapport, trust and respect

- Show empathy at an appropriate level – express understanding of issues but remember that these issues are owned by the coachee – as Coach you must remain objective and focussed and not collude with the coachee.
- Make time for the coachee as agreed at the start of the coaching relationship

Hints and Tips (continued)

- Provide tools, techniques and creativity to help move the coachee forward
- Question, observe and use active listening techniques.
- Give positive recognition of achievements and actions, encouragement and support.
- Be non-judgmental/open minded
- Be open and challenging
- Give honest and constructive feedback
- Focus on future opportunities
- Help coachee to stay on track and remain focussed on their objective/goal
- Respect the views/rights of the coachee even if you do not share them

Section 3

Coachee's Guide

Is Coaching for Me?

Once you've been appointed to do a job, particularly if it's well paid or considered to be a high-flying job, expectations are generally very high. You may be expected to hit the ground running, know everything, be able to handle all issues with ease, deal with other people's problems and in general be super-human.

There are very many people who are appointed or promoted to challenging posts because of the skills and capabilities they have demonstrated already. Yet six months later they are floundering and don't appear to be up to it all. You may be one of those people or feel that your employer sees you like this. Alternatively, you may feel you are coping, but think you could be doing more or something could be better.

It's not unusual for people, even at the beginning of their careers, to feel they are supposed to know more and be able to do more than they are currently able to. A common and recurrent nightmare is the feeling that somehow they will be 'found out' as not being up to the job and demoted or even thrown out on their ear.

What is often overlooked when people are recruited for a job - wherever they are on the career ladder - is that they will usually benefit from, or even need, some form of guidance and support along the way. Some organisations know this and part of their employee care is to have a coaching and/or mentoring programme in place to provide that support.

Even for people who are fortunate enough to work for such an organisation, they may feel uncomfortable or embarrassed asking for support internally, and so they go without. This is where the "I should know it all already" belief kicks in, and the offers of coaching go unheeded because of self limiting concerns or beliefs that they will look weak if they ask for this sort of support, or will be seen to be a problem that needs to be fixed. They may not have an understanding of how coaching might help or even what it is. There may even be misconceptions that it is some form of therapy. They may welcome coaching for their own staff but deflect their own insecurities by maintaining that it is not something they will benefit from.

More often than not, organisations (particularly public services) have no formal support package in place for new or existing staff and so they struggle on alone, making the best of the situation. Most manage to get by, some feel unable to continue and so either leave the organisation, or end up suffering in silence or worse still, falling ill from the isolation and stress. Eventually the employer has to deal with the situation and the outcome is often far from ideal for all parties.

In the world of sport, you'd know what to do: you'd have a coach who would work with you on your fitness, your training and eating regimens, your attitude, your goals. You'd be supported by someone who had your best interests as a priority. You would not even question that coaching was part of the deal; it would be integral to your development. Unfortunately in organisational life, having a coach is often perceived as having a problem, being weak or needing support to do your job. This is absolutely not the case. Having a coach should be regarded as the norm and what all leaders, senior executives and managers should view as part of their ongoing development; coaching should be seen as one of the ways in which they can fulfill their potential and achieve the desired results for themselves, their teams and their organisations.

Coaches help us get better at what we already do. Good coaching is unbiased, objective support that identifies the best of our qualities and abilities and helps us develop them; it identifies which hurdles are difficult to overcome and works with us to finds ways to remove or circumvent them when appropriate. Good coaching comes from someone on the sidelines with our best interests as a priority.

A coach is independent of our work situation, loyal and interested. They help us find our own ways to deal with immediate difficulties as well as helping plan a long-term strategy. A coach has a range of skills which can be deployed to stretch and challenge us, developing and moving us forward, often at a pace that brings improvements noticeable to ourselves and those around us – both up and down the organisational ladder.

Finding a prospective Coach

Coaches are generally happy to undertake a discussion or provide a sample session, typically 15 to 30 minutes duration, to help them and also the coachee get a feel for a possible coach/coachee relationship. This is the normal first step for any coach in considering a potential new working relationship. You will learn a great deal about yourself in this process and will enjoy discovering the right partner to work with you. The questions you ask prospective coaches are entirely up to you as you seek the best fit for your needs. Below are some sample questions for you to consider:

- Tell me about your coaching practice, including your specialty or niche
- Describe the characteristics of clients you work well with
- Tell me about your background and experience and how it will help me meet my goals in my area of interest
- What is your level of training and certification as a coach?
- What is your involvement with the coaching community?
- What other activities are you involved in with your work as a coach?
- Do you coach clients working on personal issues, business issues or both?
- What value-added services do you provide for your clients (eg phone/email support if needed)?
- How would you describe your coaching style?
- What would you expect from me as your coachee?
- What could I expect from you as my coach?

- What have your clients said about you as their coach?
- If I select you as my coach, what would you see us working on first?

Coaches may have some of this information available as part of a personal coaching profile, which they can provide any prospective coachees with in advance of a discussion or sample session.

Before you start looking

Professional coaching and mentoring, like all professional services, attracts a commensurate fee. Volunteer internal coaches from inside your own or partner organisations may attract no financial fee, however consideration still should be made of the time and resources involved. If the coach or mentor is creative they will work with you to strike a balance between your ideal requirements and what you are able to afford right now. It is not just the financial cost which must be taken into consideration, but also the strength of your motivation to change and how much time you are prepared to commit to the process and to achieving any tasks or 'assignments' set by your coach or mentor in between sessions.

Questions to ask yourself

What personal benefits or performance improvements are desired? Who will be paying for the programme, will it be you or your organisation? How much are either you or your organisation able to spend, in total, on your development? What proportion of this budget can be allocated to coaching or mentoring? What else do you feel you need to assist in your development? If it is either an in-house programme or your coaching is funded by your employer, think about what you want personally as well as what the organisation is likely to expect you to achieve. Have you spoken to anyone who has had coaching or mentoring in the past? How will you find a suitable and reputable coach or mentor?

Relevant Experience and Training

If you are considering employing a coach for the development of specific skills, it is worthwhile looking at their range of experience, skills and other qualifications which might determine if they have what you're looking for. What training and experience as a coach does the person you have in mind possess? It is also worth considering the profile of your coach. Some may be well known with a high profile career, others might be excellent at what they do, but are unknown outside their client circle. The better known they are the more they are likely to cost and arranging appointments might be more difficult. The most important point is to find the right coach to address your personal needs.

References & Testimonials

Many coaches will ask previous clients to provide references and testimonials and will happily make these available to you. Coaches use a variety of styles and tools that may or may not suit you so it is worth getting a feel for this area specifically.

Compatibility

Of paramount importance is compatibility or personal 'chemistry'. You do need to like the person who's going to work with you. This doesn't mean a cosy relationship where you're friends first and foremost, but it does mean you should have a rapport with which you are both comfortable and that will enable you to work well together. For the relationship to work you need to get along with each other, otherwise it becomes a duty, a 'going through the motions', rather than a mutually enjoyable process. Some organisations assign a coach or mentor, others let the employee choose; if possible, the latter is preferable

Sometimes you might end up working with someone very senior. Although this might be a little difficult at first, it is important to remember that coaching is about a two-way process and your coach may also be getting a great deal of learning from the experience. Also, it's worth reminding yourself that they are in this because they believe in it as a means of development and would not be spending time working with you if they had no faith in you or felt they couldn't help.

Coachee Guidelines – Getting the Most Out of the Relationship

Coaching is a recognised and very powerful tool to support people in their career and personal development. A professionally handled coaching relationship will encourage the coachee to become more aware of themselves and the systems and culture they work within. It will assist him/her in clarifying clear goals and direction, to enable them to improve performance and personal motivation.

The most important point to remember as a coachee is that you have the responsibility for your own success and need to actively participate in managing the relationship. It is your development and your career. You drive the relationship with mutual agreement that your Coach will be giving you the benefit of his/her time and expertise. You are responsible for adhering to the ground rules you will have worked through with your Coach and signed up to as part of a coaching contract. You will get the most benefit by bringing a real life issue with you to work through, setting your own goals, tracking progress and keeping the lines of communication open.

Respect the Coaching Process

You will benefit from coaching in direct proportion to what you are willing to put into it. Be open to trying out new ideas, tools and techniques. Be open also to your coach acting as a sounding board and someone who can challenge your thinking and assumptions and challenge you about what you do and why. Give them permission to be challenging – if you are feeling uncomfortable as a result of a challenging or searching question asked by your Coach, it is likely you are learning something, be it about yourself or your situation.

Maintain Regular Contact

Beyond the coaching sessions, you may wish to keep in touch with your Coach by e-mail and/or telephone to update them on any changes, progress or indeed use them as a sounding board in relation to discussions/issues/actions discussed in your sessions. The level of contact should be agreed with the Coach up front as part of the contracting for your sessions.

Respect Your Coach's Time

Your Coach will most likely be from a Welsh Public Service organisation and in most cases, provides coaching as an addition to their day job. Though often they are seen as a "free" resource, time is very valuable. Make the most of your time together, be on time, be prepared for meetings and work on any actions you agree to take forward.

Apply What You Learn

Your coach will work with you through issues, asking you probing and pertinent questions, often using tools and techniques to help "unblock" learning. This can lead to you considering issues from different perspectives, and exploring new ways of thinking about a

situation. Use the ideas that come from this, stretch yourself a little and be open to try new things.

Preparation

You will be able to get more from your meetings when you have prepared yourself thoroughly.

- Consider what you want to achieve for yourself over the short, medium and long term. Think about career aspirations and your goals.

- Think about what the coach can specifically help you with, bearing in mind the boundaries of their role.

- For the second and subsequent meetings, check back on your outcomes and actions from the previous ones and be prepared to explain how you have progressed with them and what you have learnt.

- Talk to your line manager about your coaching and what you are looking to get out of it, and ask for their insight into your performance, ask them to comment about what the organisational expectations are (if any) of the coaching relationship. Encourage your line manager to become involved from that perspective and if appropriate, sign up to a 3-Way Coaching Contract.

After the Session

You should have some actions to work on from the session. These may be an extension of a personal action plan, new learning objectives, a small project, or simply reflecting on something. Make brief notes on the meeting so that you can remember the detail for the next one. Your coach may ask you to complete a feedback or summary form, on which you provide information about what was useful in the session, what you learnt and what actions you have committed to do (a coaching summary form is attached at Annex E)

Keeping your Line Manager Informed

Even if you are not able to involve your line manager in a three way contract, it will be helpful to let your line manager know in general terms what you are doing and build this into any performance plan or personal development plan you might have. The line manager may well be best placed to enable some development activities to take place and is integral to your future development.

Coachee Skills

Self Management

People who are self-motivated and actively think about and manage their own development tend to get the most out of a coaching relationship. You may find it useful to use some sort of learning log to log your progress, thoughts, feelings and points of learning (be it electronic, formally structured or simply a freeform journal or even some form of mind map). Try not to dwell on the negatives of your issue, talk through with your

coach, identify the issues and barriers to success, look at options to move towards a more positive/successful resolution.

Open-mindedness

Be open to ideas, suggestions and feedback from your coach. Think about what you hear or what you are asked. If, as a result of the sessions, you come up with possible outcomes or solutions which are different to your normal approach, be prepared to test these out. Be prepared to be challenged or have your ideas and approaches challenged by your Coach.

Outcome/Objective Setting

Work with your Coach to agree clear objectives and action plans for your development. Review progress regularly.

Clarity

Be clear about your expectations of coaching and ensure that these are built into the coaching contract, agreed with your coach.

Feedback

Be prepared to given honest, constructive feedback to your coach. They will want to ensure that the coaching session, approach and ground rules are working for you. If the process is not giving you what you need, you can both review the contract and look at what might be most useful for you. They are your sessions – make the most of them!

Hints and Tips

- Be open to find your own solutions and don't rely on your coach to do this for you – this is not their role
- The relationship building is a two way process - work from the outset to help build rapport, trust and respect with your coach
- Adhere to the timings and commitment for sessions as agreed at the outset of the coaching relationship
- Be open to try out new tools and techniques
- Actively seek feedback from your coach
- Don't dwell on the past, be it situations or relationships – be prepared to recognise your feelings but let go and move on
- Be non-judgmental/open minded
- Be open and honest with your coach

- Give honest and constructive feedback to your coach about what is or is not working for you
- Focus on future opportunities
- Try to be positive in your outlook

Hints and Tips (continued)

- Do your homework or preparation in advance of the sessions
- If you have to cancel, or rearrange a session contact your coach quickly to do this
- Respect your coach's expertise and the time they are spending with you – make the best use of it that you can
- Come to the sessions with goals or objectives in mind
- Involve your line manager in the process and build the coaching into your personal development

Section 4

Line Manager's Guide

Coaching Emphasis

The Coaching process is aimed at supporting the Coachee to help identify and work towards the goals and desired outcomes in a structured and focussed way. As a line manager you are probably most concerned on a day-to-day basis with the skills and capabilities that employee needs to do their job now. In order to fully maximise the benefits of coaching, we would encourage the Coachee to work with their line manager to help them identify the goals and clarify the desired outcomes, ensuring that the organisation also gets the full benefit of the work the coachee is undertaking. The Coach is not meant to provide a replacement for line management and should not be used to resolve issues that the line manager should be dealing with.

Retaining a Clear Line Management Role

The Coachee will continue to report to you and you full retain the line management role and functions.

If you are part of a three way coaching arrangement, disclosure of any information would be as agreed in the initial coaching ground rules and contract. (see additional guidance on three way contracting at Annex D)

You will be best placed to provide feedback to the Coachee on their progress or on any changes you might have observed in terms of their behaviour, approach or performance. This is vitally important for the Coachee and helps provide objective evidence that they are making progress as a consequence of their wording. You might also be able to provide opportunities or new ideas to try out different resources or new ideas so be generous and make time to discuss their development and help them identify what you can do to help them on their development journey.

In a 1:1 relationship the coach would ensure that discussion remains confidential. this is not to keep the line manager out of the loop but to ensure that the relationship has the best chance of developing with full trust. In respecting this confidentiality, you are actively demonstrating your trust in your member of staff, however you may want to encourage your employee to share with you openly and build any actions and personal development into their formal work like personal development plans/performance plans.

Hints and Tips

Give them the space to be coached and workplace support to help them take forward relevant actions arising as a result of sessions

Help them set objectives which are relevant to them, yourself and the organisation

Build these objectives into any personal performance plans

Encourage them to share progress with you, if they are comfortable doing so

Keep an open mind to the coaching process

Give them honest and constructive feedback

Section 5

Additional Guidance and Optional Coaching forms

The forms in the following pages are there as a guide. They are optional, but may be useful to help structure the process and to make sure that the Coach gets the best from the process.

Annex A – Coaching Needs Analysis
Completion by coachee before start of relationship

Annex B - 1:1 Coaching Contract (to be signed by Coach and Coachee)
This can be used in a one to one coaching relationship. It sets out the basic responsibilities of coach and coachee and covers general ground rules like confidentiality.

Annex C – **Coaching session – contracting and ground rules**
This is an example of how a coach can open and structure their part of the introductory coaching session.

Annex D – Engaging Line Managers In the Coaching Process (Three Way Contracting)
This advises how three way contracting can be approached, between individual, sponsor (or organisation) and coach.

Annex E – Coaching Session Summary Form
Helps coachee to capture key messages from the session, learning, goals, actions etc. Coach and coachee should keep a copy of this for reference.

Annex F – Reflective Coaching Log – for coaches

Annex G – Reflective Coaching Log – for coachees

Annex H – Coachee Testimony and Evaluation
Initiated by coach but completed by coachee

Annex I – GROW coaching model note sheet
The GROW coaching model, with some example questions and a note sheet (to help the coach capture key aspects of the session and actions against the stages of the model).

Annex J – OSCAR coaching model note sheet
The OSCAR coaching model, with a note sheet (to help the coach capture key aspects of the session and actions against the stages of the model)

Annex K – Coaching Log
A useful CPD tool to help coaches track their coaching activity

Annex A

Coachee Self Analysis – How appropriate is coaching for me?

The following questions are designed to assist identification of development needs and whether coaching is the most appropriate tool. Use the questions as guidelines to help identify characteristics of an Ideal coach and develop awareness of own objectives and goals in having a coach.

How could I benefit from having a Coach?

What can I gain from coaching that is different from another development option?

What are my objectives?

How can I best use the skills of my Coach?
How supportive or challenging do I need my Coach to be?

What skills do I have that can make me a successful Coachee?

How: Positive minded?
Flexible and resourceful?
Self-aware?
Non-defensive?

….am I?

Annex B

Wales Public Service Coaching Collaborative Coaching Contract

It is both coach and coachee's responsibility to work through this contract together in the introductory session, to ensure mutual understanding of the basis of the coaching relationship, roles and responsibilities.

The Coach's Ethical Approach

In a coaching relationship, the coachee's agenda is at the centre of the relationship and will be worked on jointly by both coach and coachee. As coach I do not have the answers to your issues, but I am committed to working with you to explore them and help you identify how to move forward. I will at all times do my best to help you achieve all you want for yourself but there are no guaranteed results; you get out what you put in.

At all times, I will treat you with respect and treat all you tell me in confidence. There may be occasions when something you share with me needs to be shared more widely, but we will discuss this first so that you are comfortable, and wherever possible, you will take the lead in sharing the information with others. I may be asked to feed back generic information regarding issues such as learning needs, how public services are faring generally or other points that can help inform further programmes; I will not however feed any such information back if I cannot completely guarantee confidentiality.

As an internal Welsh public service coach, I will work with a variety of people who may, or may not be known to you. I will let you know if there is likely to be a conflict of interest. Where we work together with this knowledge of others, the focus of our work will be on your situation and your responsibilities. I will not therefore refer to situations or any knowledge I have about these individuals, gained from my interactions with them.

Name of Coach: ……..

Signed: …… Date …….

Name of Coachee: ……

I agree that the prime purpose of this coaching contract is to support, maintain and enhance my personal development and performance over an agreed period of time. As the coachee, I will ensure that, to the best of my ability, I have met the agreed objectives and action plan set out at the end of each session.

We have both agreed the parameters of this relationship and discussed their practical implications for us.

We have agreed to meet every …. weeks for ….. sessions. We have agreed that 1 to 2 hours is a suitable length of time for our sessions. We will time these sessions to coincide with specific stages of work or situation, so that constructive feedback can be provided and objectives reviewed. It is the joint responsibility of both the coach and the coachee to agree the scheduling of these sessions.

Our first coaching session will be on:

Date: ……..

Time: ……..

Venue: ……..

If for any reason a session is cancelled, we will meet again at the next mutually convenient date. The person who has cancelled the session has the responsibility to re-arrange the session. Each coach will have their own cancellation policy, considering how many sessions can be cancelled before they review the situation with their coachee and consider ending the relationship.

I understand that taking part in this coaching contract places responsibilities on me. I agree to prepare for each session, to be punctual and to actively participate. I agree to carry out any follow-up actions that I choose to commit to within the coaching sessions as per agreed timescales. I understand that all that is discussed between us will be treated in absolute confidence, unless we agree that information can be shared with another party.

I agree to complete all evaluation forms during and following the final session.

I will ensure that the session is not interrupted, in order to give full attention to the interaction.

Any changes in circumstance will necessitate the discussion and agreement of a new coaching contract.

Either party can request a termination of the agreement if there is a breakdown in the coaching relationship, inadequate commitment to the process or lack of progress being made.

I have read, and agree, this coaching contract.

Signed:

Coachee: …… Date: ……

Coach: …… Date: ……

Line Manager: …… Date: ……
(If appropriate)

Coaching Session – Contracting and Ground Rules

(an actual example of a coach's approach the contracting chat at the first session)

1. Introduction of coach
Introduce self and background
Outline qualification and number of years experience in coaching

2. About the coachee
- What is your understanding of coaching?
- Have you ever experienced coaching before?
- How is your line manager involved/aware?
- What do you hope to get out of coaching

2. Explain coaching

- Coach's role
  Support and use listening, questioning and clarifying skills to help individual work through issues/problems in a structured way with firm plan of action. Give feedback on any recurring issues etc.
- Coachee's role
  To be open to change, challenge and own the issues. The coach cannot solve the problem for you – you have the best experience
- Commitment
  Talk about commitment of both to the relationship. Unpaid role but most coaches are providing coaching as an addition to their day job. If you need to cancel, please do as far as possible before within reason and bear in mind policy and contractual agreement e.g. 2 cancellations and relationship needs to be reviewed.

Contract
- Explain purpose of contacting and show contract
- Confidentiality – no disclosure unless under exceptional circumstances, or if 3 way contract agreed – agree limit of information to be provided to a 3rd party
- Ethics – as a coach I adhere to the EMCC (or other ethical code)
- Outline number of sessions usually offered, duration and dates
- Attendance at sessions – cancellation
- Note taking – how much you take and what purpose it serves
- Challenge – how much? (not just a cosy chat)
- Feedback
- Contact – should be proactive contact between coach and coachee
- Explain end of relationship - "no fault" divorce if not working for either/both parties

Commitment

- How committed is the coachee to coaching (on a scale of 1-10)

If happy to go ahead…

Set out dates and agree plan of action for sessions…

Annex D

3-Way Coaching Contract

Coachee name:

Coachee Role:

Coachee Organisation:

Line Manager:

Coach:

Date Coaching Commenced:

Review date: Final evaluation:

Coaching Issues – general areas to be worked on

1.
2.
3.

Agreed specific outcomes related to each issue:

1.
2.
3.

Coachee signature: …….. Date: ……

Line manager/sponsor signature: …… Date: …….

Coach signature …… Date: …….

Actual outcomes following coaching – as agreed at final evaluation

-
-
-
-

Coachee signature: …….. Date: ……

Line manager/sponsor signature: …… Date: …….

Coach signature …… Date: …….

Engaging line managers in the coaching process – guidance for coaches

Purpose and expectations

The Wales Public Services Coaching Network is keen to raise the profile of coaching across Wales at all levels of public service. A number of initiatives are underway to help leaders and their team to become more aware of the benefits of coaching and who within their organisation is acting as a coach.

Part of this ongoing work involves encouraging coachees' line managers to be supportive of the coaching process as well as to take an active role in helping coachees transfer their learning effectively to the workplace. The Network also wishes to encourage line managers to contribute to shaping the overall goals of the coaching sessions and to reviewing the results. There are a number of potential advantages of involving line managers in this way. Miles Downey* points to the creation of "better quality goals" and to important opportunities for feedback that might otherwise be missed. Julie Hay** believes that line managers can (and should) provide "valuable developmental support" to coachees. Other benefits can include:

- a shared and clear understanding between the coachee, manager and coach about the potential and limits of coaching
- encouraging routine constructive feedback between the coachee and their manager about how they work together
- increased transparency about the role and purpose of the coach.

Options for involving line managers

The Welsh Public Service Coaching Network proposes two main options for engaging line managers.

1. The preferred option is for managers to be involved in 3-way conversations at the beginning and end of the series of sessions. (This document provides some pointers about how you can do this effectively as a coach).

2. An alternative option is for coachees to talk first to their manager about the goals and outcomes of the coaching sessions *before* beginning their coaching. The Network recognises that coachees and their managers may well have had a discussion about the goals of the coaching before they contact you as their coach to make their first appointment, in which case there will be no need for a 3-way session. And, in situations where arranging a 3-way conversation proves difficult logistically, the Network suggests that the coaching is not delayed but starts without the line manager's involvement. In these cases, it would be good practice to encourage the coachee to share their first iteration of coaching goals with their line manager *after* the first coaching session. In any event the network should encourage the coachee to have regular conversations with their manager about the focus and progress of the coaching sessions and about the support they need to develop themselves and to enhance their performance.

Occasionally, a coachee may express reservations about the involvement of their line manager. Here the Network believes you need to make a judgement as to whether a 3-way conversation will add more than it subtracts from the quality and effectiveness of the coaching relationship. It is suggested that you begin coaching and provide an opportunity for the coachee to explore the actions they might take to build their relationship with their manager. Again, in line with good practice, you should encourage your coachees to talk to their manager about the purpose of the coaching.

As with all coaching, clarity and precision at the contracting stage is vital in ensuring the appropriate conditions are established for effective 3-way working.

** Miles Downey "Effective Coaching – Lessons from the Coaches' Coach" (2003)*
*** Julie Hay "Reflective Practice and Supervision for Coaches" (2007)*

A typical approach

One way of engaging managers involves:

First coaching session: line manager attends an early part of the session for a 3-way contracting conversation with the coachee and coach, including helping to shape the goals for coaching

Final coaching session: line manager attends the closing 30 minutes of the session to take part in a 3-way collaborative review of progress over the period of the coaching contract.

An outline guide to putting this approach into action

In the table below you will find some guidance about how to involve the line manager effectively in the coaching process. As the coachee will be making contact with you to set up the coaching relationship and to schedule their first appointment you will need to have a discussion at this point about which of the 2 options outlined above for involving their line manager is to be used.

A useful structure for the first coaching session can be:

- **opening 30 minutes:** coach and coachee (without the line manager) contract about the purpose, goals and logistics of the coaching; this provides an opportunity to start to get to know the coachee and their priorities and to explain the coaching process

- **next 20 – 30 minutes**: coach and coachee are joined by the manager to agree some overall key goals for the series of session; the focus here should remain on the coachee, who should have complete control over what they wish to reveal in the 3-way conversation; as the coach you will facilitate the session and you will need to make sure manager and coachee are clear about your role here.

- **remaining part of the first session:** the manager leaves and the coach and coachee begin the coaching process bearing in mind the set of goals, which have been established.

It is crucial you emphasise to both the coachee and the manager that the coaching process is founded on full confidentiality (subject, of course, to the caveats you discussed in your coach training programme).

First coaching session

Purpose	Key points
To establish a clear and shared understanding about coaching – in general, and in this specific context	Explain coaching and the contracting process emphasising: • the focus on topics that impact the coachee's work in order to produce outcomes that benefit the individual and their organisation • the focus on enhancing overall performance, which involves exploring successes as well as challenges and problems • the developmental/facilitative role of coaching – you are not managing the coachee, or doing the manager's job • the importance of regular dialogue between coachee and manager about the ongoing progress and outcomes of the coaching – so that the coachee can transfer their learning effectively to the work situation, and the manager can provide appropriate support • the importance of confidentiality – i.e. you will not be communicating with the manager outside the two 30-minute sessions, and what the coachee and manager say to each other here is under their control • the need for flexibility and responsiveness in coaching to take account of the possibility that the goals may shift as the sessions progress – based on changed work priorities or the coachee's development needs • your role as coach – to facilitate these 3-way conversations and not to act as a "conduit", "mediator" or "arbiter" between the coachee and manager

	• the purpose and key features of the second and final 3-way conversation at the end of the coaching.
Creating goals for the series of coaching sessions	Facilitate a discussion about the most appropriate overall goals for the sessions emphasising: • the creation of a set of agreed, shared goals between the coachee and the manager – N.B. the *coachee* should be invited to begin by exploring their thinking, to which the manager adds; these goals are often termed the "public" goals to indicate that they are known to both the coachee and their manager • the flexibility and responsiveness of coaching in meeting needs and interests as they emerge – which can necessitate a change of goals; the coachee should be encouraged to discuss any significant amendments with their manager as part of their regular dialogue about the coaching • the coachee will also have opportunities to establish a set of "private" goals for the coaching, which will not be open to the manager, but nonetheless will focus on areas that impinge on behaviour and performance at work. In order to avoid splitting , the coach should work with the coachee to frame these private goals as ***in the service of*** the public goals

Final coaching session – closing 30 minutes

Purpose	Key points]
To review collaboratively the progress and outcomes of the series of coaching sessions	Facilitate a discussion about the outcomes of the coaching, starting with the *coachee's perceptions* of their learning and development and emphasising: • your role in the 3-way conversation, including offering challenge and support to both the coachee and the manager • the original agreed "public" goals, including, if necessary how and why these changed over the course of the coaching

	• the individual and organisational gains from the process • the importance of constructive feedback between the coachee and manager – e.g. encouraging active listening, and an appropriate balance of constructive challenge and support • the practical actions now required for the continuing development of the coachee and the support required, from and through, their manager.

Based on the approach developed by OPM and adapted from the West Midlands Coaching Pool documentation.

Coaching Session – Summary

1. Key messages you took from the coaching session

2. What do you feel are your strengths?

3. What do you think are your areas for development?

4. Goals/actions identified

5. What did you agree to do before the next session?

6. What did your coach agree to do before the next session?

7. Any other points or comments?

Please ensure that Coach and Coachee keep a copy as a reminder of the session.
Thank you

Name ……..… Date ……
Name of coach ……..……
Date and venue of next session:……...

Annex F

REFLECTIVE COACHING LOG

This is for your own reflection as Coach, and does not need to be passed back to PSMW.

Name ……. Date ……..

Session information (duration, issue, theme etc.)

What 3 words best describe the session?

How did you build a rapport with the coachee?

What went really well?

Did you do anything completely new?

Did anything surprise you? (For example, about something you discovered about yourself, working with others, the way you reacted to anything that happened etc.)

Is there anything you know now that you didn't know before this session?

Did you find anything challenging? Why?

Did you find anything satisfying? Why?

Were there any difficulties? How did you resolve them? If you were faced with the same issue again, would you do anything differently?

Any other general reflections?

REFLECTIVE LOG - Coachee

This is for your own reflection as a coachee, picking up immediate thoughts and feeling about your coaching sessions.

Date of session:

My goal:

My action(s):

My deadline(s):

Date of next session:

3 words that describe today's session

What went really well?

What went less well

Did anything surprise you? (For example, about something you discovered about yourself, working with others, the way you reacted to anything that happened etc.)

What did I learn about myself today?

Was anything challenging or uncomfortable? Why?

What did I like about today's session. Why did I like it?

On a scale of 1 – 10 (1= low, 10 = high), how motivated am I to change?

Any other general reflections?

Coachee Testimony and Evaluation

Have the coaching sessions helped you move forward?

Yes/No

If yes, in what way? If possible, please specify the actual outcome(s) achieved:

What specific issues have your coaching sessions helped you to address?

What would you say have been your key insights/learning points during the coaching sessions?

How useful have the coaching sessions been for you?

If not useful, how can these sessions be improved:

Signed: …….. Date: ……..

Name: …….. Role: ……

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Annex I

THE GROW MODEL – SESSION NOTESHEET

G	Useful Questions	Notes
Goal **Agree topic for discussion** **Agree specific objective of session** **Set any longer term aims**	**What are you hoping to achieve from the session?** **How will you know when you have achieved your goal?** **How will you know when the problem is solved?**	
R		
Reality **Invite self assessment** **Offer specific examples of feedback** **Avoid or check assumptions** **Discard irrelevant history**	**What is happening now?** **What, who, when?** **How often?** **What is the result/effect of that?** **What evidence do you have of that?**	

O		
Options **Cover the full range of options** **Invite suggestions from coachee** **Ensure choices are made**	**What else can you do?** **What else could you do?** **Are there constraints?/Is this within your control?** **What if that constraint was removed?** **Who can make this happen?** **How can they do that?** **What are the benefits downsides? (of each option)**	
W		
Way Forward/Wrap Up **Coachee commits to action** **Identifies possible obstacles** **Makes steps specific** **Agree support needed** **Commitment to actions**	**So what will you do now, and when?** **What could stop you moving forward?** **How will you overcome this?** **Will this address your goal?** **How likely is this option to succeed (scale 1-10)** **What else will you do?** **Who can help you achieve your goals?**	

THE OSCAR MODEL – SESSION NOTESHEET

O - Outcome (Your destination) (This is where you clarify the outcomes around any given situation).	**Useful Questions** What is your long term outcome? What would success look like?	**Notes**
S - Situation (Your starting point) (This is where you get clarity around where you are right now).	What is the current situation? What's actually happening? Describe the current situation.	

C - Choices and Consequences (Your route options) (This is where you increase awareness about the consequences of each choice).	What choices do you have? What options can you choose from? What are the consequences of each choice? Which choices have the best consequences?	
A - Actions (Your detailed plan) (This is where you take responsibility for your own action plan).	What actions will you take? What will you do next? How will you do it? When will you do it, with whom? On a scale of 1 to 10 how willing are you to take those actions?	
R - Review (Making sure you are on track) (This is where you continually check that you are on course).	What steps will you take to review your progress? With whom will you review your progress and when? Are the actions being taken? Are the actions moving you towards your outcome?	

Annex K

Coaching Log

Month: October Year: 2009

NAME	w/c 1.08	w/c 8.08	w/c 15.08	w/c 22.08	w/c 29.08	Total
Fred Bloggs	1.50				1.00	2.50
Mary Jones			1.25			1.25
Mickey Mouse		1.00			0.75	1.75
Me being coached/ suprvised				2.00		2.00
Extras-Coaching/talks/training				1.25		1.25
Total	1.50	1.00	1.25	2.00 1.25	1.75	5.50 2.00 1.25

KEY:
0.25= quarter hour/15 minutes
0.50= half hour/30 minutes
0.75= three quarters hour/45 minutes
1.00= 1hour/60 minutes

Red hours denote me being coached/supervised
Green denotes time spent training/giving talks/1-off or ad hoc coaching