

COACHING TOOLKIT

Initially written and produced for the Start Network, Talent Development Programme by Sara Swords and Ben Emmens, and on behalf of the CHS Alliance.

This toolkit has now been adapted for a wider audience by the CHS Alliance in January 2018.

PREFACE

There is no defined or set way to coach. It is about understanding the principles behind coaching, creating the right environment for the conversation, understanding your role as a coach and then enabling the person you work with to tell their story.

This toolkit has been designed to support you, as a coach. Over time, your own experiences will supplement what it contains. The toolkit should be used as a starting point for your coaching practice and you should not feel restricted by it. It is based on a toolkit that was produced for the coaching network under the Start Network's Talent Development Programme. The Talent Development Programme was a three-year project which aimed to build the capacity of national humanitarian workers in East Africa, Asia and the Middle. The coaching network was a global network of in-house and independent coaches. The network was made up of national staff members of INGOs, NGOs and the public sector in the implementing countries and qualified coaches with a humanitarian background dispersed across various countries. From March 2015, the CHS Alliance, working with a team of global coaching experts, trained and supported 115 coaches in Kenya, Ethiopia, Jordan, Bangladesh and the Democratic Republic of Congo. Throughout the duration of the Talent Development Programme, these coaches have delivered coaching sessions to 416 coachees across the learning and development programmes. For further information on the Start Network project go to www.start-network.org and for further information on the Talent Development Project to <https://startnetwork.org/start-engage/talent-development>.

Terms used throughout are:

- **Coach** – the person doing the coaching and the audience for this toolkit
- **Coachee** – the person receiving the coaching.

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1. WHAT IS COACHING?

Coaching is a structured conversation, tailored to an individual's experience, their learning needs, context and competence. The coaching process and relationship supports the individual to make more conscious decisions and to take effective action within day-to-day experiences.

Coaching builds an environment of reflection and action within which an individual works out the best approaches to their challenges and opportunities. It is a supportive, thought-provoking and creative process that helps individuals gain new perspectives on themselves and their situations.

It is also:

- A short-term intervention
- Focused on change and results
- A dialogue to help coachees be more successful by:
 - ✓ setting and reaching better goals
 - ✓ focusing on actions, priorities and obstacles to change
 - ✓ applying ideas and actions from learning workshops
 - ✓ being challenged to accomplish more
 - ✓ making use of the feedback and techniques in the coaching relationship to achieve success

2. BENEFITS OF COACHING

Coaching should have particular benefits at three levels:

For coachees

- By working with coaches, coachees are challenged to 'think harder' and more broadly about issues covered and how to achieve their learning objectives within their context
- Coachees will therefore be more accountable for delivering their stated learning objectives and achieving meaningful results
- Coaching helps to increase coachees' levels of confidence and self-awareness
- It increases application and practise of skills and knowledge

For organisations

Many agencies are talking at this time of building up coaching expertise within their organisations. The widespread use of coaching will help to build a critical mass of coaches working within organisations and communities. Coachees who receive coaching will be able to reflect on that experience and to use those skills in their work as team leaders and managers. This builds a wider repertoire of management styles.

For coaches

Any opportunity to practise coaching skills and techniques within various coaching relationships, and to reflect and receive feedback on the use of those skills, a process which is invaluable in improving coaching skills. It also helps to develop more general management and learning and development skills. Coaching has been found to be an effective way to work with partners as well as within teams and with staff members.

3. COACHING SESSIONS: PREPARATION AND INTRODUCTIONS

The prime responsibilities of the coach are to:

Establish and maintain the coaching relationship with the coachee:

- set out the parameters of the coaching relationship
- prepare for each session by looking back at previous notes
- build trust with the coachee

Communicate effectively:

- demonstrate active listening
- demonstrate effective questioning
- provide appropriate, regular and constructive feedback to the coachee
- be open to feedback in return as to how to improve the coaching relationship

Coaches should have:

- existing coaching experience in varying contexts or have demonstrable experience of using questioning, listening and feedback skills in their current work role
- experience of humanitarian work and constraints
- an understanding of and appreciate the dilemmas and challenges of humanitarian work
- ability to act as a catalyst in further developing a coachee's potential and performance – the coaching emphasis is on results, accountability and follow-through
- ideally some experience of Skype or remote coaching

In order to start a coaching relationship well, as a coach you may wish to prepare the following:

- a personal profile, which can be provided to coachees. This could include your work and your coaching experience
- ensure that you are familiar with any organisational policies that could relate to coaching such as the Code of Conduct, a coaching agreement and safeguarding policy and procedures (templates are included in appendix 2 and 3 and so that you can see what might be included). In addition, the Core Humanitarian Competency Framework or any other relevant competency frameworks - this could be organisational or technical (see Appendix 1) should be reviewed, alongside any self-assessment diagnostic tools that may have already been completed by the coachee.
- understand how the coaching element fits within any other development programme the coachee might be on, and gain an understanding of the expectations of the manager and the organisation if they are supporting the coaching process. This is likely to including an introductory meeting and a final debriefing meeting.

In your introductory email you may wish to reiterate:

- the value of coaching and your role as a coach in this.
- that coaching should be seen as a formal learning component with their managers committing to allowing the coachee time out for the coaching

- send possible dates and times for the first coaching session and confirm contact details
- confirm how many coaching sessions there will be in total (sessions are normally no longer than a month apart but arrangements will be decided between coach and coachee and sessions are usually up to one hour)
- ask the coachee to identify their learning priorities. (e.g. *Why set up a coaching relationship? What do you want to achieve?*)
- outline their work role and an outline of challenges and priorities. (e.g. *What is your current work role? What are the key challenges you face in that role? What current strengths do you have that you use every day?*)
- what in particular they would like to discuss during the first coaching session
- how best you can work with them as a coach
- any likely connectivity problems

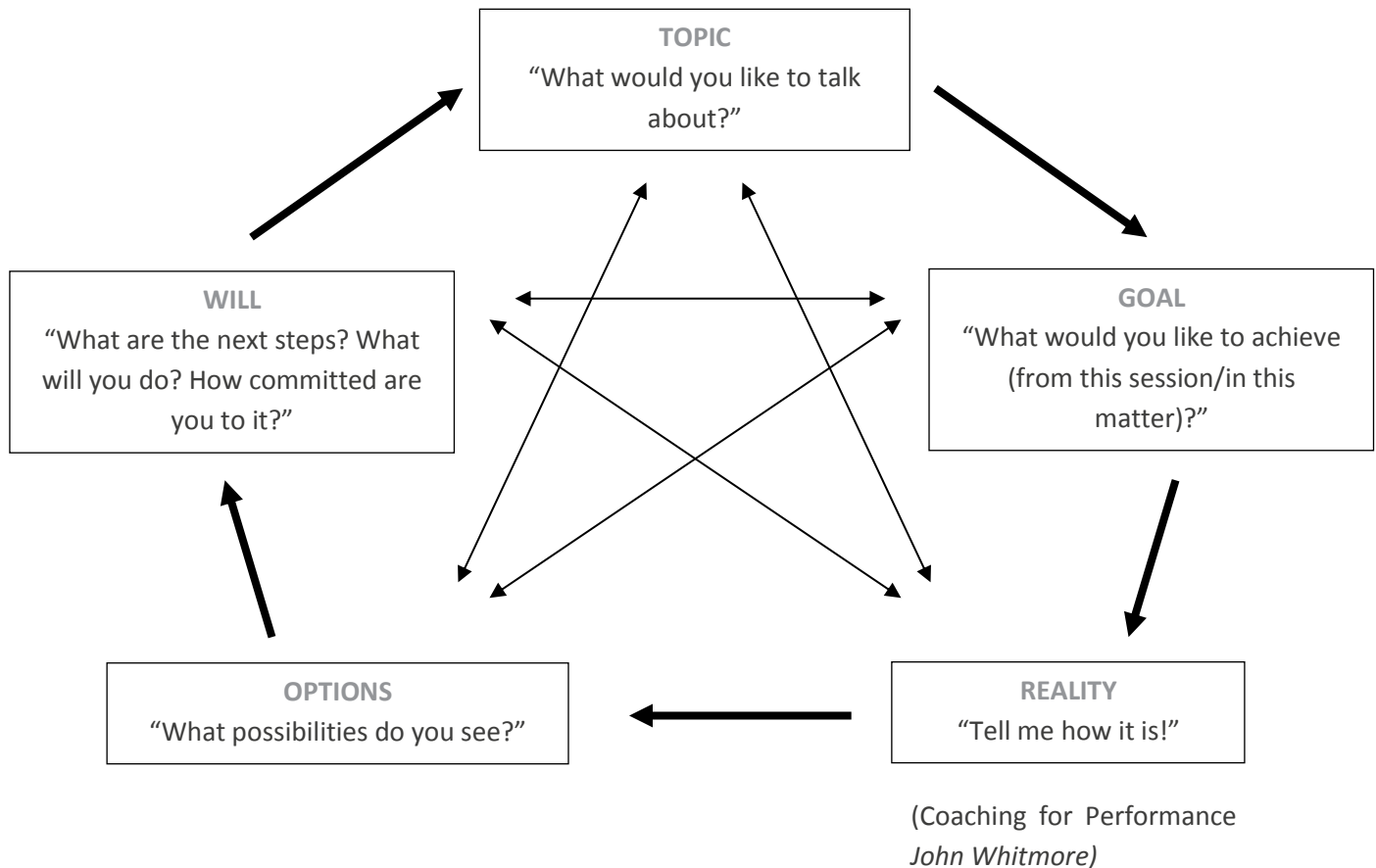
4. COACHING MODELS

The GROW model provides a basic structure for any coaching session, and can be used flexibly to guide the coach and the coachee towards successful decisions, learning and actions. It was originated by John Whitmore (2002).

The stages of the model are as follows:

G	GOAL	Establish the Goal of the meeting in discussion with the coachee Having established what the coachee wants to discuss in the session, the coach explores the coachee's goal, where they ideally want to get to by the end of the session and what they want to achieve.
R	REALITY	Establish the current situation The coach then helps them to explore the way things are now, their ability, probing to establish why things are the way they are. This helps to establish the gap between the present reality and the ultimate goal.
O	OPTIONS	Identify options Having established the Goal and Reality, the coach can then assist the coachee to look at different options that may help them to get from their current reality to their future goal.
W	WILL	Decide the next steps to be taken Most importantly, the final stage is to get the coachee to commit to specific, practical and achievable actions that will enable them to move closer to their goal.

The GROW model



Sample questions for each stage of the GROW model:

The benefit of this framework is that the ownership for any change is placed in the hands of the person being coached. When planning a session, remember that the actual questions you use will depend on the responses you hear back from the coachee. If you simply work through the questions below, the session will feel like an interrogation.

GOAL

What is it you would like to discuss?
 What would you like to achieve by the end of this coaching session?
 In the long term, what is your goal related to this issue? What is the time-frame?
 What will success in this matter look like?
 How will you know that you have achieved what you want to achieve?

REALITY

What is the present situation in more detail?
 What is happening at the moment?
 What and how great is your concern about this?

Who is affected by this issue other than you?
How much does this matter to you?
How much control do you personally have over the outcome?
Who else has some control over it and how much?
What action steps have you taken on it so far?
What stopped you from doing more?
What obstacles will need to be overcome on the way?

OPTIONS

What are all the different ways in which you could approach this issue?
Make a list of all the alternatives, large or small, complete or partial solutions.
What else could you do?
What would you do if you had more time, a larger budget, or if you were in charge?
What would you do if you could start again, with a new team?
What are the advantages and disadvantages of each of these options in turn?
Which would give the best result?
Which of these solutions appeals to you most, or feels best to you?
Which would give you the most satisfaction?

WILL

Which option(s) are you going to choose?
When precisely are you going to start and finish each action step?
What could arise to stop you in taking these steps or meeting the goal?
What personal resistance do you have, if any, to taking these steps?
What will you do to eliminate these external and internal factors?
Who needs to know what your plans are?
What support do you need and from whom?
What will you do to obtain that support and when?
What could I do to support you?
What commitment on a 1 – 10 scale do you have to taking these agreed actions?
What prevents this from being a 10?
What could you do or alter to raise your commitment closer to 10?
Clarify again what immediate steps are you going to take?
How and when can you do this?

When you are using the GROW Coaching Model successfully, you feel like you are having a natural conversation rather than walking through a checklist of questions. The important thing is to feel comfortable. The more comfortable and confident you are, the more productive and successful your coaching conversation will be.

GROW is the most widely used model and other models are referred to in the resources section at the end of this toolkit

Mentoring and how it differs from coaching

Mentoring involves the use of the same models and skills of questioning, listening, clarifying and reframing associated with coaching.

However, mentoring in the workplace has tended to describe a relationship in which a more experienced colleague uses his or her greater knowledge and understanding of the work or workplace to support the development of a more junior or inexperienced member of staff.

One key distinction is that mentoring relationships tend to be longer term than coaching arrangements. Mentoring relationships work best when they move beyond the directive approach of a senior colleague 'telling it how it is', to one where both learn from each other.

5. GUIDE TO THE COACHING SESSIONS

Suggested questions for each session (to draw from):

When preparing for the sessions use GROW questions and the other questions suggested in this toolkit and in Appendix 4 and 5.

First coaching session

As part of the introduction, think about and make clear:

- timing
- what will happen if you become disconnected
- explain your role as coach
- assure that details of the content of the session remain confidential
- establish clear outcomes for the coaching – what the coachee wants to achieve through the learning process.
- Explain as a coach you will summarise general points from the session to help create an overview of effectiveness and development needs
- explain that you will write up notes after each coaching session to summarise general learning points. These summaries will give information on general themes covered which is helpful for monitoring and evaluation. These summaries must not compromise the confidential nature of the coach/coachee relationship.

Sample questions to guide the coaching session:

The goals for the sessions are developed by the coachee, which helps them to control the learning that derives from it. Opening questions should reflect this.

- What would you like to cover during the first coaching session? Check against what they had initially outlined or set out as their outcomes.
- How do you want to use this session?
- What in particular do you want us to focus on?
- How can I help you achieve this?
- What do you want to achieve before our next session?
- What strengths do you want to build on?

Session wrap up:

- Confirm the details for the next coaching session – date and time.
- Confirm any actions and follow up

Ask for feedback on the session:

- How has the coaching worked?
- What was useful?
- How far do you feel we got during this meeting?
- How was it useful?
- What particular questions helped you during this conversation?
- Where could I (the coach) have pushed you harder in your thinking?

It is advisable after each session to write up a brief summary of the conversation. This will serve as reference notes to help you build on each session as the coaching continues.

Subsequent coaching sessions

Here are some questions that may help you build on previous sessions:

- What are your key learning points from the last coaching session so far?
- What was new or surprising?
- What did you learn about yourself? Strengths, areas to improve? How do these reflect your learning priorities that you have identified?
- How has it been since the last coaching session? What has happened since we last spoke?
- How relevant was the learning to your current role?
- What have you been able to put into practice?
- What would be the most helpful thing for you to take away from this coaching session?
- What have been the significant events and learning for you?
- What have been the areas with which you didn't cope so well? What are the reasons for that? What can you do about them?
- What has been easy?
- What has been difficult?
- What is stopping you from implementing the actions discussed before?
- What has supported you implementing the actions?
- What have you done about this?
- What have your workplace colleagues and/or your manager noticed about you since you started receiving coaching?
- What do you think?
- What is next?
- Who can support you further to continue the changes you want to make?

Final session

- How best do you want to use this final session?
- What has happened since we last spoke?
- What else do you need to do to build up your humanitarian skills and strengths?
- How have you used coaching skills yourself? With what effect?
- What do you think?
- What is next?

6. NO SHOWS

It is important to keep a record of contact attempts with coachees in order to be able to report on 'no shows' (people who do not turn up for the coaching at the agreed time).

Hopefully it will not happen, but there could be an issue when a coachee does not show up at the agreed time. Where there are genuine reasons for missing a first session it will come down to your judgment and availability as to how much you persist. For a second or third coaching session you may want to send a gentle reminder via Skype or email the day or week before.

As a coach you should check that the coaching relationship is working well for the coachee. Not all relationships will have the right chemistry. As a coach it is important to assure the coachee that they have the right to say it's not working for them and to encourage them to say this if you feel there could be an issue.

7. THE IMPORTANCE OF LISTENING, GIVING FEEDBACK AND QUESTIONING SKILLS IN COACHING

The GROW approach alongside your skills in listening, giving feedback and questioning will ensure that the coaching process enables the coachee to think through their situations for themselves.

Listening

It is not only about the questions you ask in coaching that are important, but also how effectively you listen to the coachee's answers and the story told. Here are a few reminders to help achieve active listening.

Why listening is so important in coaching

- ✓ Coaching is a structured conversation and is built around the relationship that is developed between coach and coachee.
- ✓ Listening is not simply the opposite of talking. It is acknowledging what is being said and acknowledging who the coachee is, feeling the emotions, pausing and holding the space for the coachee.
- ✓ The coach must listen for significant moments – looking for clues of the coachee's deeper level of insight and readiness for change.

Tips:

- **Focus on content.** Listen to what is being said and how it is said rather than assuming you know what will be said. Be curious and listen out for inconsistencies to explore with the coachee.
- **Remain open minded.** How does the coachee see the world? This is likely to be different to your own view. What is the best way to work with the coachee to help them view their situation from different perspectives?

- **Avoid distractions.** If your mind wanders or is distracted, then breathe deeply and bring yourself back to the immediate moment. Distractions are to be expected and it is important to be aware of this.
- **Treat listening as a challenging mental task.** You need to concentrate on what is said and listen out for words, images, tone and energy.
- **Stay active by asking yourself questions.** Active listening keeps you alert. It is a disciplined approach. Here are some questions you can ask yourself as you listen: What key point is the person making? How does this fit with what I have already heard? What unmet need does this point to?
- **Use the gap between the rate of speech and your rate of thought.** You can think faster than the person can talk. That is one reason your mind may tend to wander. All the above suggestions will help you to keep your mind occupied and focused on what is being said. Your mind does have the capacity to listen, think and write at the same time, but it does take practice.

Listening is difficult because we are not trained in it, our minds get distracted every few seconds, we have to let go of control and are often not used to this.

We listen at different levels:

Level 1 is internal listening. This is when we interpret what we are hearing through our own experiences and views. At this level we are keen to hear more information and explanation and then process it in terms of what it means to us (not the coachee).

Level 2 is focused. Our awareness is fully on the other person and this is manifested in body language and posture, if face to face coaching. The coach is like a mirror. They notice what the coachee says, what they don't say, when they come alive and when they withdraw.

Level 3 is global. The coach tunes into the environment and that attention enables us to observe the bigger picture, which includes energy levels and how they shift, being sensitive to and trusting of our senses and actions and interactions.

Coaching happens at levels 1 and 2. As a coach listens, they make choices that can change the direction and focus of the coaching conversation. That is the impact of listening where we make the choice in the moment of what to do next.

What are we listening for?

- Change in energy, pace, thoughtfulness
- Images or metaphor that the coachee uses to express their situation which can be unpacked
- Significant moments – drop in energy, realisations
- Tensions (inconsistencies, anger, frustration)

Feedback

Here are some principles for giving and receiving feedback in coaching.

- ✓ When giving feedback, the more recent the example, the more impact it will have
- ✓ Ensure the timing is appropriate for the individual (e.g. avoid times when they are under tight time pressures, or the session is about to end)
- ✓ Consider your motives before giving feedback i.e. what do you want the end result to be? Ensure it serves the needs of the learner and not the giver
- ✓ Give feedback on successes as well as where things can be improved
- ✓ Focus on behaviour, not personality e.g. *'In that example what was the balance between who was speaking and who was listening?'*
- ✓ Give feedback on something that can be changed. There is no point in drawing attention to something that cannot be remedied
- ✓ Make your feedback detailed, based on descriptions of specific behaviour you hear
- ✓ Be descriptive rather than judgmental or evaluative - avoid phrasing feedback in terms of good or bad, right or wrong
- ✓ Limit your feedback to the amount of information that a recipient can use – don't overload
- ✓ Focus on what is missing, rather than what is wrong - this helps performance next time

When receiving feedback, a coachee may want to:

Reflect before reacting. It is easy to be defensive, so encourage the coachee to let the results sink in before they do anything. You may wish to ask if the feedback seems accurate or does it resonate with anything they have heard in the past. They may wish to check their understanding

Decide what to change. Help the coachee decide what feedback is most important to them and to prioritise what they might want to start working on immediately in order to get results

Get support from others. Encourage them to ask for regular feedback from their manager, as well as other key people (peers, direct reports, mentors, etc.).

Questioning

As a coach, by using questions you will encourage the coachee to think situations through for themselves and this will encourage deeper learning. Types of questions that can be used include:

Open Questions

These do not have a definite answer. They encourage the individual to think more deeply about a situation and explore different ways of thinking. Open questions develop rapport, create involvement and check understanding in more depth.

These questions usually begin with:

- **What** is the position with...?
- **When** was the report due?
- **How** does this impact on...?
- **Who** else could become involved....?
- **Where** could this happen?
- Tell me about.....

It is helpful to funnel down the questions - from the open and exploratory to the more precise.

From: What issues do you want to discuss?

To: **What are the most important issues here?**

To: **Which issue do you want to tackle in this session**

To: **What are the precise factors involved?**

To: **What steps can you take?**

To: **What milestones will you set?**

To: **When will you do this by?**

Open questions can also encourage someone to think rather than get defensive. Why? For example, 'Why did you do that?' tends to cause defensiveness.

Probing questions

Probing questions are used following open questions to probe opinions, feelings or generate alternatives.

Examples:

- What are your immediate options?
- If you did that, what do you think would happen?
- What would be your ideal situation?
- How do you feel about speaking to them?
- How did you react when you realised the order would be late?
- If you could bring X into this room now, what would you like to say to him/her...?
- I think I've heard you say..., can you clarify a bit more on....?
- What do you want to happen to move things on?
- What would things look like if they were better?
- Tell me three things you are doing right in this situation and three things you want to reconsider.
- You cannot work on everything at once, where do you see the biggest pay off?

- What would this situation look like if you were managing it better?
- What do you need to do to keep yourself to the task?

Summarising/clarifying questions

These are used to ensure that you have correctly understood thoughts, feelings or opinions.

Example:

I would like to pull a few things together.... If I heard you correctly, you are saying...

Statements

Certain sorts of statements help fuller discussion of difficult areas.

I'm not quite clear on..... I notice that..... I wonder if..... I'm thinking that..... (Use 'I' rather than 'You' as much as possible).

You can find other powerful questions in Appendix 4 and more techniques in Appendix 5.

8. USING YOUR OWN EXPERIENCE IN COACHING

You may consider being a coach because of the experience you have had to date. However, within the coaching session you do not want to simply impart that experience (e.g. 'What I would do in that situation is.....'). As mentioned above, the GROW approach and the examples of listening, giving feedback and questioning show that coaching is about enabling the coachees to think through their situations for themselves. Your experience will enable you to ask better questions.

It is only when you have enabled the coachee to explore fully their context and resourcefulness for themselves that it may be appropriate to ask if they would like to hear about an experience you have been through. This would then be sharing information rather than giving advice, which leaves the recipient free to decide the most appropriate course of action for themselves. Once you have shared your example, you can then follow up with coaching questions.

9. FINALISING THE COACHING – REPORT, REFLECTION AND EVALUATION

If an organisation is paying you to run the coaching sessions, as well as attend an introductory meeting with the manager, then they may request a brief report and a final meeting with the manager. Therefore, as the coach you may want to keep notes on each session and so that a summary overview can be submitted. The summary overview could cover the general themes identified, broad areas of discussion and progress as identified by the coachee. The actual content of sessions should remain confidential. Only top-level information needs to be shared and it should not compromise the confidential nature of the coaching relationship.

As a coach, this is your opportunity to reflect on your development as a coach. It is important that coaches value improved self-awareness and learning from the process in the same way that you are encouraging the coachees to do this.

In addition to self-reflection, you may wish to send an email to the coachee after the formal coaching sessions have finished to gain feedback on the coaching. In this way, you can learn how your coaching has helped the coachee to develop and grow in a particular way.

Suggested questions could be:

- How did the coaching help you to develop as part of your learning programme?
- What specific actions or questions helped you most?
- How could I improve my coaching approach in the future?
- What would you say are the benefits of coaching as you have?

10. REFERENCES AND RESOURCES

On-line training

- Humanitarian Leadership Academy, Kaya – ‘An Introduction to Coaching and Mentoring’, <https://kayaconnect.org/course/info.php?id=661>

Websites with resources for coaches:

- <http://www.coachingstory.org/> - 2-minute animation on what coaching is
<http://www.coachingstory.org/resources/videos-podcasts/>
- <http://www.youtube.com/watch?v=XQ1FdpfW8X0>
- <http://www.youtube.com/watch?v=xNLRo3jWPcg>
- <https://www.youtube.com/watch?v=XQ1FdpfW8X0> - John Whitmore – shows the video clip about golfing skills and how this applies to coaching
- Johari questionnaire: there are many free resources on line that include the diagram of Johari’s Window and the test

Books

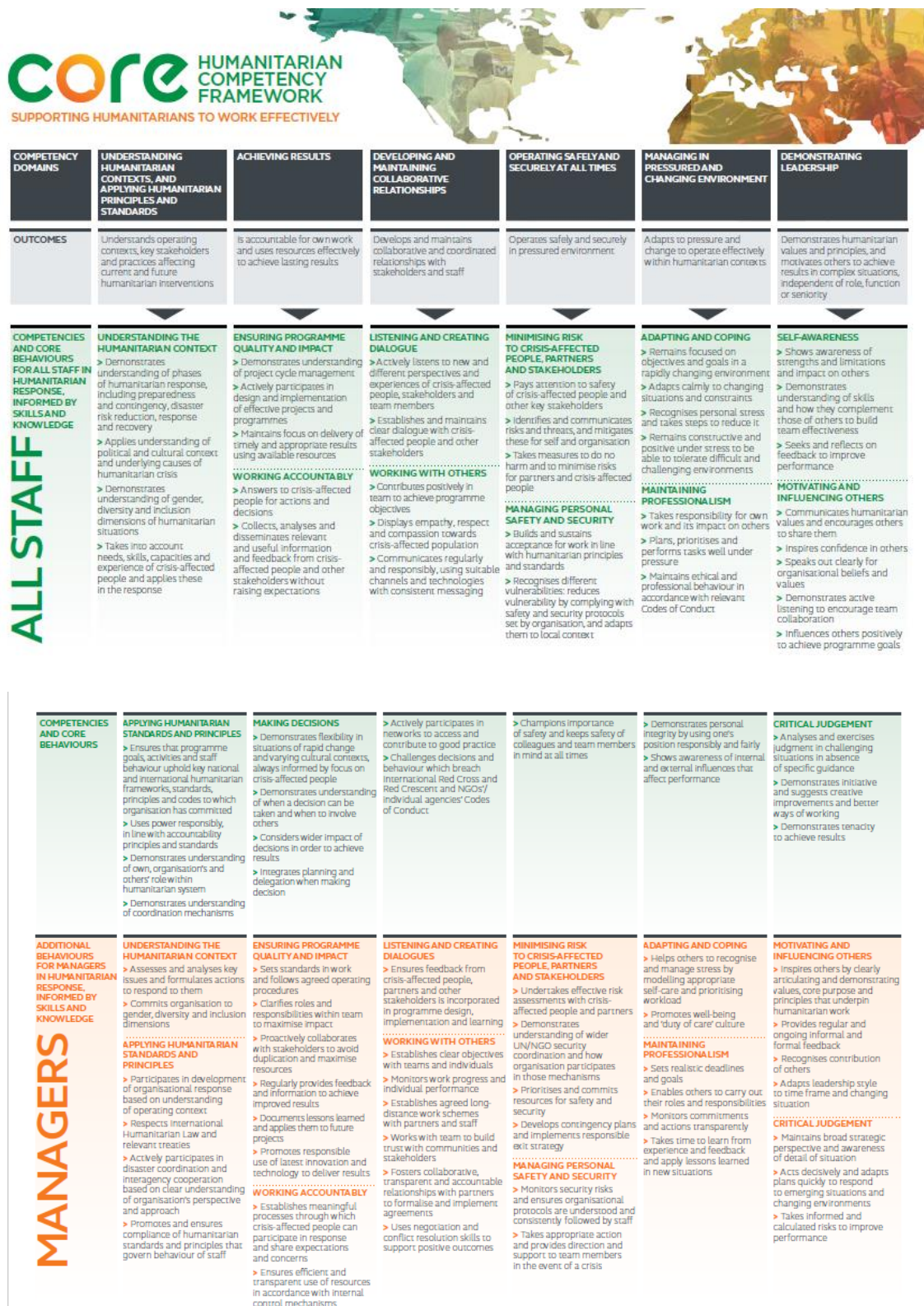
- ‘Why Motivating People Doesn’t Work and What Does....’, Susan Fowler, November 2014
- ‘Co-Active Coaching: Changing Business, Transforming Lives’, Henry Kimsey-House and Karen Kimsey-House, Aug 2011
- ‘Executive Coaching with Backbone and Heart’, Mary Beth A. O’Neill and Vanessa Hart, July 2016
- ‘Excellence in Coaching, the Industry Guide’, edited by John Passmore, Dec 2015
- ‘Coaching for Performance, The Principles and Practices of Coaching and Leadership (People Skills for Professionals)’, John Whitmore, June 2009

Resources about other coaching models:

- ‘The NLP Coach’, Ian McDermott and Wendy Jago, reprinted 2010
- Clean Language: <http://www.cleanlanguage.co.uk>
- CIGAR model (Current reality, Ideals, Gaps, Action and Review) <https://vimeo.com/68491953>
- SUCCESS model (Set expectations, Uncover wisdom, Create awareness, Craft Action Plan, Evaluate outcome, Summary report, Star Performer) <https://coachcampus.com/coach-portfolios/coaching-models/jean-biacsi-the-success/>
- Narrative coaching, David Drake <http://www.narrativecoaching.com/what-is-narrative-coaching.html>
- OSKAR (Outcome, Scale, Know-How, Affirmation and Action, Review) <https://www.mindtools.com/pages/article/oskar-coaching-framework.htm>
- CLEAR (Contracting, Listening, Exploring, Action, Review), Peter Hawkins <http://www.personal-coaching-information.com/clear-coaching-model.html>

APPENDIX 1:

Core Humanitarian Competency Framework



APPENDIX 2:

Template: agreement between organisation and coach

As a coach, you will partner with coachees to focus on exactly what they want to achieve, apply the learning, and articulate the outcomes they want, against their measures of success. The coaching should be tailored to individuals as they develop their humanitarian practice within their working context and apply skills to new opportunities. It is a supportive, thought-provoking and creative process that inspires coachees to maximise their personal and professional potential.

As a coach you will comply with this agreement and the organisation's Code of Conduct and safeguarding policy and procedures. In particular, coaches will conduct themselves in a way which respects the diversity of the coachees working in different regions. Trust and responsibility are at the heart of the coaching relationship, and so it is expected that coaches will always act with integrity regarding their own behaviour and that is shown towards their coachees. It is the responsibility of the coach to provide the best possible service to each of their coachees/coachees and to act from a position of dignity, autonomy and personal responsibility.

To achieve this within the coaching process, as a coach you will:

- ensure you use your level of experience, the Coaches Toolkit and knowledge to meet the needs of designated coachees
- respond to the coachee's learning and development needs as defined by the agenda brought to the coaching relationship
- establish clear outcomes for the coaching – what the coachee wants to achieve through the learning process
- align your coaching approach with the belief that coachees are naturally creative, resourceful and capable of finding their own answers
- respect the rights of others to hold values, attitudes, and opinions that differ from our own
- understand and ensure that the coaching relationship reflects the humanitarian context within which the coaching is taking place
- ensure that the coachee understands what can be achieved through the coaching and how those expectations can be met
- seek to create a coaching environment by Skype or alternative means in which there is the best opportunity for learning
- maintain confidentiality when creating, storing, accessing and disposing of records under their authority in accordance with this agreement and laws within the operating countries
- write up notes after each coaching session to summarise general learning points. These summaries will be collated, to give information on general themes covered. These summaries must not compromise the confidential nature of the coach/coachee relationship
- understand how the coaching element fits within the wider context within an organisation and to use the Core Humanitarian Competencies Framework or alternative, as part of your coaching approach
- abide by the organisation's Code of Conduct and safeguarding policy and procedures.

To achieve coaching professionalism the coach will:

- maintain the level of confidentiality which is appropriate and is agreed at the start of the relationship
- keep a record of contact attempts with coachees to be able to report back to the manager about no shows, etc
- deliver a total of X as per the agreement, coaching sessions for each of our coachees
- operate within the limits of own competence and where concerned speak to the individual or manager (whichever is appropriate) about referring on to another professional, such as organisational counsellor
- accurately identify coaching qualifications, expertise, experience and certifications
- notify the coachee and obtain assistance for difficulties at an early stage which might impair coaching performance
- Only use the coachee contact information (e-mail addresses, telephone numbers, etc.) in connection with the coaching
- carefully explain and strive to ensure that, prior to, or at the initial session, the coachee understands the nature of coaching and any other terms of the coaching agreement.
- not engage in unfair discrimination on any basis whatsoever
- respect the coachee's right to terminate the coaching relationship at any point during the process, and remind them to send feedback to the training provider on why it is ending prematurely
- conduct yourself in accordance with this agreement in relation to the coaching and coaching reporting requirements, and comply with the Code of Conduct and safeguarding policy and procedures.

Signed: (Coach)

Date:

APPENDIX 3:

Template: Safeguarding Policy and Procedure for Coaches

Policy statement

We, (organisation)

- listen to and take seriously any concerns raised by, and the views and wishes of, both coaches and coachees
- ensure staff and coaches are fully aware of their responsibilities in recognising and reporting any concerns
- take positive steps to ensure the protection of coachees, including working in partnership with other professionals
- will work effectively with other agencies through sharing information and co-operating with any subsequent investigation

We have a zero tolerance approach to any harm to or exploitation of our coachees by a coach, or by any staff, representatives or partners. This includes a zero tolerance approach to online harassment or stalking, and any unsolicited or inappropriate contact (for example messages or photos / pictures) via email or a social media platform (such as Facebook, Twitter, Instagram or Linked In).

Coaches are expected to provide (organisation) a self-declaration of criminal or disciplinary background, and provide evidence of professional coaching accreditation, and / or bona fide professional status including professional qualifications, according to organisational procedures. Other background checks (including anti-terrorism vetting) may be undertaken as required by the organisation.

Coaches are expected to adhere to the Coaching Agreement. Whenever concerns are raised about their work, they are investigated honestly, fairly and robustly with the best interests of coachees as an absolute priority.

There may be occasions when a coachee shares information with their coach which causes the coach to believe that the coachee is either at risk of serious harm or death and/or about to put themselves (or someone else) at risk of serious harm or death. Such instances must be taken seriously and reported according to the procedure below. With regard to confidentiality in such instances, the coaching agreement established between the coach and the coachee should make it clear that if a coachee shares information of this nature then the coach has a legal and moral obligation to report it, in line with this Safeguarding policy and procedure.

Procedure

Any allegation of wrongdoing or complaint relating to a coach made by a coachee or another coach, or any other safeguarding issue or concern that a coach needs to raise, should be directed to the via the confidential email address

..... has a policy for the handling of allegations, complaints or safeguarding-related reports, and the following guiding principles apply:

Confidentiality

Confidentiality is critical to a satisfactory outcome in order to protect privacy and safety of all concerned. Personally identifiable information concerning the individual/s concerned is actively protected from disclosure. The nature of the complaint, allegation or report, its facts, identity of the complainant or alleged victim or survivor, witnesses and the subject of the complaint, as well as investigation records, are dealt with in a confidential manner. When a complaint, allegation or report is received, access to information regarding the complaint and its response procedure is restricted to an authorised member of staff who has been designated this duty, usually the Safeguarding focal person. Reports to the board on complaints, allegations or reports of this nature do not contain names of individuals.

Disclosure will be permitted when:

1. specific permission was given by the complainant; and,
2. required by law; or,
3. it is needed to obtain specialist help for the complainant, victim or survivor or advice on the evidence (with the permission of the complainant).

Responsiveness

Each complaint which falls within the scope of this policy is acknowledged in alignment with the agreed response timeframe as outlined in this policy.

Non-retaliation

It is the right of all stakeholders to complain. Any attempt of retaliation against a complainant is considered gross misconduct and will result in immediate disciplinary action against such behaviour.

Objectivity

Every complaint is addressed in an impartial, equitable and objective manner.

Safety and welfare

The safety of the complainant, alleged victim or survivor, witnesses, subject of complaint and staff is paramount. A risk assessment must be carried out for each complaint, and safety and welfare precautions must be considered before proceeding to deal with a complaint.

Finding solutions

..... will assist members when requested, in finding solutions where concerns are raised about them. This will encourage learning and continual improvement.

Investigating and following up of a complaint or allegation relating to safeguarding

1. Every allegation of a violation of a safeguarding policy is taken seriously. The safeguarding focal point is responsible for ensuring all credible allegations are logged and tracked.
2. The safeguarding focal point is tasked with following up with the other involved staff and consultants to ensure all allegations are properly investigated (initial assessment) and all appropriate corrective action and remedial measures are taken.
3. Representatives covered by this policy must cooperate fully with any investigation or inquiry and preserve all records relating to any alleged violation of this safeguarding policy. Although confidentiality cannot be guaranteed, reported concerns will be kept confidential to the extent possible.
4. If the complaint, allegation or incident relates to something that is happening / has happened the head office jurisdiction, then it will be the responsibility of the relevant authorities there to organize an investigation.
5. Investigation in exceptional cases: In cases where the allegations relate to a senior member of staff, or are likely to result in serious reputational injury, or other exceptional cases (collectively, "Exceptional Cases"), the Safeguarding focal point shall consult with, as appropriate, on how the investigation should proceed, including to determine whether should retain an external party to investigate the allegations.

Initial Assessment:

1. Upon receipt of a complaint or allegation or report, an initial assessment will be conducted by the Safeguarding focal point. A full account of the matter and any further action will be recorded. The Executive Director or equivalent and Safeguarding focal point will consider the circumstances of the report, seek professional advice and determine next steps.
2. Reporting to Applicable Authorities: Depending on the nature of the complaint or allegation or report, and where it has taken place or who is at risk (i.e. the legal jurisdiction), will make a referral to the relevant authorities (e.g. the Police or social services) as soon as possible and within one working day.

Signed: (Coach)

Date:

APPENDIX 4

Additional powerful questions for coaching

Assessment

What do you make of it? What do you think is best? How does it look to you? How do you feel about it?

Clarification

What do you mean? What does it feel like? What seems to confuse you? Can you say more? What do you want?

Evaluation

In what way? Is this good, bad, or in between? In what ways? What do you think that means? What is your assessment?

Exploration

May we explore that some more? What other angles can you think of? What is just one more possibility? What are your other options?

Will you give an example? For instance? Like what? Such as? What would it look like?

Elaboration

Will you elaborate? What else? Is there more? What other ideas do you have about it? If you could do it over again, what would you do differently? If it were you, what would you have done? How else could a person handle this?

History

What caused it? What led up to.....? Can you remember how it happened?

Implementation

What is the action plan? What will you have to do to get the job done? What will you do? When will you do it?

Integration

What will you take away from this? How do you explain this to yourself? What was the lesson? How would you pull all this together?

Learning

If your life depended on taking action, what would you do? If the same thing came up again, what would you do? If we could wipe the slate clean, what would you do?

Options

What are the possibilities? If you had your choice, what would you do? What are possible solutions? What if you do and what if you don't? Who has the information you need? Can you think of four different ways of tackling this situation?

Outcomes

What do you want? What is your desired outcome? If you got it, what would you have?
How will you know you have reached it?

Perspective

What would you think about this five years from now? In the bigger scheme of things, how important is this? So what?

Resources

What resources do you need to help you decide? What do you know about it now? Who is a manager you admire? How would they tackle this situation? What resources are available to you?

Substance

What is stopping you? What concerns you the most about...?

Summary

What is your conclusion? How is this working? How would you describe this? What do you think all this amounts to?

APPENDIX 5:

Further coaching techniques

We can get stuck into a usual way of problem solving and working with others. The essence of coaching is to be imaginative and to look for a variety of solutions. Listed below is a range of coaching techniques which will expand your coaching toolkit.

Scaling - Encourage the staff member to rate current levels of performance against levels of effectiveness they could achieve. (1 – low/10 - high). Useful benchmark for subsequent review.

Move from easy to hard - If you need to work on several behaviours, pick the one that is likeliest to change quickly and with the least distress: then move on to more entrenched behaviours.

Micro goals - Setting targets along the way to an ultimate development goal: e.g. if the ultimate goal is to stop overly controlling behaviour, a series of micro goals might encourage the staff member to:

- hold back opinion in a meeting until everyone else has spoken
- delegate an important piece of work
- practice active listening

Tape delay - For staff who speak without thinking first; as coach you would encourage them to wait five seconds before responding to a question.

Encourage more positive feedback - People have a tendency to focus on problems more than successes. When coaching, do not just dwell on the negative.

Acknowledgment - Catch them doing something right.

Use immediate examples - Coach them on the spot.

Model good practise - Show by example.

Challenge - Warn them first and play devil's advocate.

Find differences from the last meeting - Use specific examples.

Find patterns to consider and break if desired - Identify repetitive behaviours.

Focus on the solution and not the problem - Spend more time focusing on the positive outcome than the obstacles.

Restrict alternatives - Avoid deflecting off the point.

Identify exceptions - If the person is stuck in examples of failure, seek exceptions to the rule.

Visualisation - Imagine and picture it different.

Ideal vision - If a magic wand could transform the situation, what would the outcome look like?