



FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

COACHING FOR CAUSE-DRIVEN LEADERS

LEADERSHIP COACHING GUIDE

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INTRODUCTION

The Y's cause is to strengthen community. Every day, we work side-by-side with our neighbors to make sure that everyone, regardless of age, income, or background, has the opportunity to learn, grow, and thrive.

This opportunity is made possible through a culture of coaching that inspires commitment, expands abilities, and motivates action for all who engage with the Y—staff, members, and volunteers. This guide, focused specifically on leadership coaching, will help Y staff and volunteers grow in their capacity to contribute to the Y's cause.

Lasting social change begins with personal change.

When we see how we can make a more powerful impact and receive the support that helps us reach our goals, we become more effective at fulfilling our cause. Ys that intentionally develop others through a culture of coaching can experience

- enhanced ability to advance the mission and cause;
- improved employee engagement and retention; and
- increased capacity and resources.

WHAT IS COACHING?

Coaching happens every day in the Y and can take many shapes and forms. For this reason, it may be helpful to start with a definition that clarifies the Y's unique approach.

Coaching is a trusting and committed relationship where a person (the coach) collaborates with another (the coachee) toward accomplishing a shared goal. At the Y, the coaching process involves four core phases: explore, plan, act, and sustain.

Notice that this definition involves two parts: the coaching relationship and the coaching process.

The Coaching Relationship

First, there is the coaching relationship: a trusting and committed relationship where one person collaborates with an individual, or a group of people, to accomplish a shared goal for the coachee's development or growth.

This definition includes many kinds of relationships where one person collaborates with another in a positive way. In the Y, these types of relationships occur frequently. They include, but are not limited to:

- Coaching a sports team
- A supervisor coaching a staff member
- Healthy lifestyles coaching
- A staff member coaching a health seeker
- A volunteer coaching a young person
- Peer-to-peer coaching
- Coaching a community leadership team in support of Pioneering Healthier Communities

In this guide, we use the terms *coach* and *coachee* to describe the participants in a coaching relationship.

A key to understanding the coaching relationship is that coaching is not done *to* someone, it is done *with* someone. Successful coaching requires a significant investment of time and effort—a commitment from both the coach and the coachee to the coaching relationship.

The **coach** is a trusted person who collaborates with an individual or a group of people to accomplish a shared goal for the coachee's development or growth.

The **coachee** is a person or a group of people desiring to develop and grow.

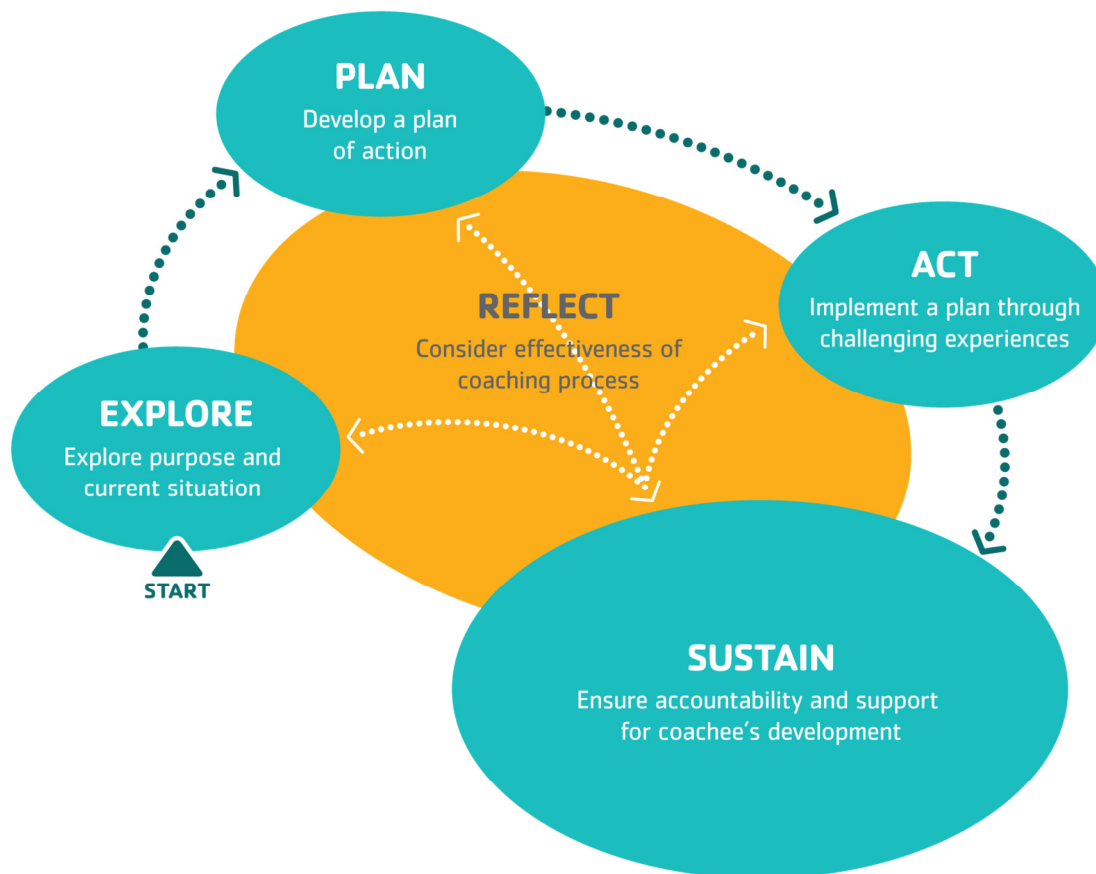


The Coaching Process

The second part of our definition refers to the actual work of the coaching process.

After reviewing more than 35 different coaching models, an advisory board made up of highly skilled coaches from Ys of various sizes around the United States collaborated with Y-USA staff to customize a coaching model to meet the needs of Y members, staff, and volunteers.

Through this effort, we discovered that successful coaching in the Y occurs in four core phases: explore, plan, act, and sustain (EPAS). The EPAS coaching model is illustrated below.



As a critical element in the leadership coaching model, time to reflect should be infused into each of the four phases. The “Leadership Coaching Tools” section provides banks of sample questions to generate thinking as you reflect on each phase of the coaching process.

Core Beliefs of Great Coaches

Coaching is a learned skill that takes practice: the more an individual coaches, the better at coaching he or she becomes. While coaches bring their own personalities and styles to their approaches, a core set of beliefs and abilities are a starting point for success in any coaching situation.

Coaches believe	<ul style="list-style-type: none">• Coaching works• All people are talented and coachable• People develop themselves
Coaches will	<ul style="list-style-type: none">• Listen and ask powerful questions that help coachees discover answers on their own• Let go of assumptions and stereotypes• Build relationships with people of diverse backgrounds• Collaborate• Adapt to different needs and situations

ABOUT THIS GUIDE

While there are many kinds of coaching relationships and situations in the Y, this guide focuses specifically on leadership coaching. Effective leadership coaching strengthens staff and volunteers at all levels across the Y, whether they engage in coaching to build their own competencies or to guide others as they build theirs.

This guide serves as an important tool in developing cause-driven leadership as part of the Y's Leadership Competency Model. It includes simple, easy-to-follow instructions and tools for anyone desiring to coach or be coached. It can also benefit those who want to create a culture of coaching in their Y.

The first part of this guide, which contains six sections, provides a high-level overview of coaching and the Y's coaching model. The second part provides tools to support each step of the model.

SECTION 1: Leadership Coaching	This section briefly reviews the Y's Leadership Competency Model, describes the competencies most important for coaching, and explains how leadership coaching benefits the coachee, the coach, and the Y as a whole.
SECTION 2: Common Leadership Coaching Scenarios	Leadership coaching can be used to develop staff and volunteers under a variety of circumstances. Included are common scenarios in which leadership coaching will contribute to optimal learning and development.
SECTION 3: Creating an Optimal Coaching Environment	This section explains the necessary components for creating a nurturing, genuine environment for coaching to work. These include suspending judgment, establishing common trust, encouraging open communication, and gaining commitment.
SECTION 4: Applying EPAS to Leadership Coaching	This section outlines the four-phase model (explore, plan, act, sustain) for leadership coaching in the Y. Included are suggested reflection questions for each phase.
SECTION 5: When Leadership Coaching Works Best	This section identifies the characteristics of people who will respond well to the coaching process and clarifies when alternatives to coaching might be a better solution.
SECTION 6: Evaluating Effectiveness	Ideas and questions are provided for you to measure your effectiveness as a coach or to measure the effectiveness of a coaching program.
Leadership Coaching Tools	Practical templates and questions for each phase of the coaching model are here to assist you in coaching.

HOW TO USE THIS GUIDE

Here are a few examples of how this guide could be used to support leadership coaching:

- A staff member reads this guide prior to taking Y-USA's Leading and Coaching Others course.
- A staff member reads this guide while working with a coach to improve job performance.
- A supervisor reviews the EPAS coaching model to ensure effective coaching of a direct report.
- A CEO uses this guide to develop and implement a coaching program. Participants in a formal leadership development program (e.g., Y-USA's Multicultural Executive Development Institute or Executive Preparatory Institute) study this guide as part of the program's curriculum.

LEADERSHIP COMPETENCY RESOURCES

To gain the most from this guide, consider using it along with the Y's growing collection of resources that support cause-driven leadership at the Y. The recommended course for learning and practicing the skill of leadership coaching is *Leading and Coaching Others*. The Y leadership competencies describe the knowledge, skills, and behaviors required to advance our cause and lead a high-impact YMCA.

These Y leadership competency resources provide information and tools for recruiting, developing, and retaining cause-driven leaders and can be found on YMCAexchange under Staff and Volunteer Development:

- *Leading and Coaching Others*. A two-day course held at a regional training event followed by eight weeks of leadership coaching practice and completion of a post-course skills assessment.
- *Recruitment Tool Kit*. A guide for developing a recruitment strategy and tools to enhance recruitment efforts.
- *Leadership Competencies Interview Guide and eLearning*. A process for recognizing leadership competencies in job candidates.

- Online *Leadership Competency Assessment*. An opportunity for staff to rate themselves on each of the leadership competencies and view a summary of the results.
- *Leadership Competency Development Guide* and *Leadership Competency Development Plan*. Resources for expanding and enhancing leadership knowledge, skills, and abilities.

Leadership Coaching Guide serves as the vehicle for successfully employing the Y's leadership competency development tools on a daily basis, providing support and regular feedback.

SECTION 1: LEADERSHIP COACHING

In an effort to develop stronger leadership at all staff and volunteer levels across the Y, YMCA of the USA (Y-USA) has designed this guide specifically around leadership coaching. Leadership coaching supports Y staff as they identify areas where they would like to grow professionally and put into action a plan for achieving their goals.

The Y’s foundation for all leadership development activities, including leadership coaching, is the Leadership Competency Model.¹ This model describes the competencies—knowledge, skills, and abilities—required to be successful in staff and volunteer roles at the Y. Through coaching, many coachees may discover a desire to develop one or more competencies so they can make a more powerful impact in the work they do every day.



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¹ To learn more about the Leadership Competency Model, see the *Leadership Competency Development Guide*, available on YMCAexchange.

We have a responsibility to those who depend on us to be a high-impact, cause-driven organization. It is through leadership coaching that we will develop the highly skilled, cause-driven leaders required to effect lasting personal and social change in our organization's three areas of focus: youth development, healthy living, and social responsibility. Effective leadership coaching brings leadership development to life on a daily basis.

EMBRACING THE 70/20/10 LEARNING MODEL

Leadership coaching plays an imperative role in the 70/20/10 Learning Model. According to this model, 70 percent of professional learning and development takes place from real-life, challenging, on-the-job experiences; 20 percent comes from coaching, feedback, and observing and working with role models; and 10 percent comes from formal training.

Traditionally, the Y has focused on formal training as the primary mode of learning and development. Embracing the 70/20/10 model in the Y represents a significant shift in thinking about how we successfully develop cause-driven leaders.

The 70/20/10 model encourages us to think beyond classes, courses, and curricula and focus also on helping staff and volunteers learn from experience. While courses and classes continue to be a part (10 percent) of how we train and develop leaders, we will expand our focus on experiential learning and coaching.

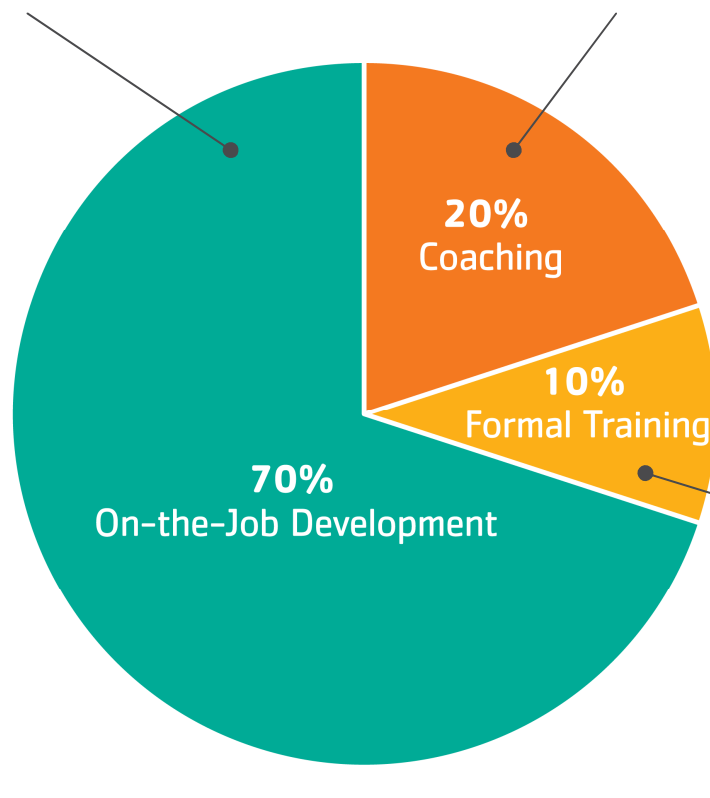
Learning is about acquiring new ideas from experience and retaining them as memories. Instead of solely structuring learning around content, most learning (70 percent) should be structured around experiences.

And, since 20 percent of learning is the result of coaching, feedback, and observing and working with role models, managers and supervisors need to be skilled in leadership coaching.

COACHING AND THE 70/20/10 LEARNING MODEL

Seventy percent of learning and development takes place from real-life, challenging, on-the-job experiences, tasks, and problem solving. This is the most important aspect of a development plan. Challenge coachees to stretch in uncomfortable areas. For example, whether or not coachees gravitate toward team building, they can learn the behaviors of excellent team builders, and may even come to enjoy it.

Twenty percent of learning and development comes from coaching, feedback, and observing and working with role models. Little happens without feedback tied to a goal. Encourage your coachees to seek feedback from varied sources (e.g., peers, supervisor, direct reports, members, etc.) on a regular basis and to identify and shadow or interview someone who is highly skilled in the competency they are working to develop.



Ten percent of learning and development comes from formal training. Formal training can be delivered in a variety of ways, including the Y-USA training system, your YMCA, a third-party vendor, a college or university, online programs, self-study, and books.

BENEFITS OF LEADERSHIP COACHING

Coaching is a proven developmental technique that positively affects the coach, the individual being coached (coachee), and the Y culture.

For the Coach

It is important to understand that the most effective supervisors are those skilled as coaches. Beyond the personal satisfaction and pride coaches might feel from helping others grow, coaching others brings additional benefits:²

- **Building a stronger team.** Well-coached people are more focused, adaptable, and resilient and therefore more likely to be prepared when change happens. When people are growing, they deliver better results through their dedication, excitement, and productivity.
- **Attracting talent.** Effective staff and volunteers flock toward growth opportunities. Supervisors lure the best and brightest people when they cultivate a reputation as leaders who help people learn and grow. Additionally, growth and opportunity differentiate the organizations that can recruit top talent from those that cannot.
- **Developing leadership competencies.** Coaching is a learned skill that requires practice. By advancing coaching skills, a coach strengthens leadership competencies such as Developing Others, Relationships, Influence, and Change Capacity.

For the Coachee

In the coaching partnership, coachees discover key abilities that enable them to accomplish goals. Coachees develop action steps to overcome obstacles that might arise, resulting in stronger performance and new behaviors.

When coachees experience leadership coaching, they are invited to tap into their full potential by leveraging their talents and strengths.

They also gain confidence as they make progress toward personal and professional goals and gain needed support as they increase leadership competencies and take on more responsibility.

² Peterson, David B., and Mary Dee Hicks. *Leader As Coach: Strategies for Coaching and Developing Others*. Minneapolis: Personnel Decisions Internations Corporation, 1996.

For the Y

Organizations with a culture of developing others outperformed organizations without such cultures by 400 percent in revenue and 780 percent in growth.³ Those organizations also increased productivity, improved teamwork, reduced cost, and increased member satisfaction.⁴ Coaching maximizes the Y's training investment, resulting in up to 55 percent more growth and improvement for the individual than when training is conducted without coaching.⁵

A coaching culture will help the Y as we strive to develop a next generation of leaders who are inspired and prepared to preserve the Y's work as the leading nonprofit for youth development, healthy living, and social responsibility.

Additionally, the Y will continue a long heritage of recognition as an organization skilled in developing cause-driven leaders, which could result in attracting more staff and volunteers who want to be part of such an organization. According to The Gallup Organization, the primary reason people leave an organization is because of a bad experience with a supervisor. Training supervisors to become better coaches will help Ys retain staff.

³ Crane, Thomas G. *The Heart of Coaching: Using Transformational Coaching to Create a High-Performance Coaching Culture*. San Diego: FTA Press, 2002.

⁴ Anderson, Dianna, and Merrill Anderson. *Coaching That Counts: Harnessing the Power of Leadership Coaching to Deliver Strategic Value*. Burlington, MA: Elsevier Butterworth-Heinemann, 2004.

⁵ Crane, *Heart of Coaching*.

EXAMINING COACH READINESS

A great coach works to ensure that the coachee has the opportunity to attain the highest level of performance possible. Part of a coach’s success depends upon having competencies that emphasize bringing out the best in others. Success also depends on the coach’s readiness to engage in the coaching relationship in specific situations.

Leadership Competencies for Coaches

Just as coaching may lead coachees to discover specific leadership competencies they want to improve, it can also be an opportunity for coaches to enhance their own already-strong competencies or to hone competencies they want to improve.

Competencies that are especially important for coaches to possess include:



The competency of Developing Others should be among every coach’s strongest competencies. Coaches understand that they can make their most valuable contribution to developing others when they do not assume responsibility for the coachee’s choices and behaviors. Instead, they equip coachees to develop themselves. An effective coach develops others by listening, exploring reasons and options, and asking questions to clarify and focus career goals, performance issues, or developmental opportunities.

DEVELOPING OTHERS

Recognizes and acts on the need to continually develop others’ capabilities to attain the highest level of performance possible.

Tools for Assessing Coach Readiness

Before entering into a coaching relationship as a coach, consider conducting an assessment of how equipped you are to begin coaching. These are two helpful assessment tools:

1. **Online Leadership Competency Assessment.** The results will give you insight into any of the core coaching competencies you may need to strengthen to be a more effective coach. An effective coach should score a 4 to 5 in the competencies identified above.
2. **Coaching Readiness Self-Assessment.** Look for this worksheet in the “Leadership Coaching Tools” section of this guide.

Also, consider participating in the *Leading and Coaching Others* course offered through Y-USA. During the course, participants

- examine essential components of emotional maturity, self-awareness, self-management, and social management;
- gain insight on their personal impact as a leader by completing an in-depth leadership assessment;
- apply the leadership coaching model to hold others accountable, develop skills, resolve problems, and direct group decision making; and
- practice providing feedback and coaching in a variety of situations.

This blended-learning program consists of participating in a Web-based workshop, attending the two-day course held at a regional training event three weeks later, eight weeks of immersion practice, and completion of a post-course skills assessment. Visit Course Quest on YMCAexchange to register.

SECTION 2: COMMON LEADERSHIP COACHING SCENARIOS

Leadership coaching can be used to develop others in many ways, such as working toward a career goal, honing knowledge or skills, or addressing performance issues. The coaching relationship may be driven by the coachee, the coach, or both. This chart presents a few common scenarios in which leadership coaching contributes to optimal learning and development.

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Generally coachee driven</p>	<p>Career aspiration. Coaching in this setting will help coachees identify future career goals, determine what competencies are needed to achieve them, and then develop a plan to be prepared when an opportunity arises.</p> <p>Stretch assignment. A stretch assignment involves taking on a challenge for the purpose of learning a new or strengthening a weak leadership competency. Stretch assignments may include solving a problem, leading a team, or handling conflict among staff or volunteers. The challenge will cause the coachee to stretch his or her skills while coaching creates the environment for learning and success.</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Could be driven by coachee or coach</p>	<p>Leadership competency development. After taking the online <i>Leadership Competency Assessment</i>, coaching will help determine which competency gaps to work on first. A coach will help you analyze the results and prioritize your learning activities based on your goals.</p> <p>Job transition. Job transition can take various forms. Examples include promotion or taking on a new role requiring a different skill set. Engaging with a coach during job transition is intended to focus development on key leadership competencies required to be successful in the new role. Staff and volunteers pursuing coaching for this purpose are typically aware of competency gaps and enthusiastic about developing their capacities.</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Generally coach driven</p>	<p>Perception. Gaps sometimes exist between how we perceive ourselves and how others view us. A perception gap may be related to a skill or to how a person views a given situation. Coaching can help close the gap between perception and reality.</p> <p>Overused strengths. Overused strengths are often strong competencies that are overused to the point that it causes problems. For example, if you are strong in decision making, overuse of this skill could result in being seen as stubborn and unwilling to negotiate.</p> <p>Performance gap. A performance gap is the difference between desired and actual performance in a job. Performance gaps may include failing to meet deadlines, not dealing with conflict appropriately, or issues around dependability. Coaching can help identify the root causes of a performance gap and identify development opportunities to improve.</p>

SECTION 3: CREATING AN OPTIMAL COACHING ENVIRONMENT

A nurturing and genuine environment, one built on our core values of caring, honesty, respect, and responsibility, is the source of successful coaching experiences. This environment is created by ensuring that four key components are present:

- Suspension of judgment
- Common trust
- Open communication
- Commitment

SUSPENSION OF JUDGMENT

It is important for both the coach and the coachee to create a safe environment where ideas, fears, truths, concerns, and hopes can be expressed without fear of judgment by either party.

For example, as a coach, you may have a preconceived opinion of the coachee, or as a coachee, you may have heard something about your new coach. It is important to suspend your judgment of each other in the relationship.

Suggestions for suspending judgment include:

- Have open, honest conversations around what you are learning about each other and agree not to blame or use identified weaknesses against each other.
- Listen completely to what is being said without immediately going into a problem-solving mode in your head.
- Understand that you are working together to develop the whole person, not fix a problem.
- Focus your enthusiasm and energy on your desired outcomes.
- Observe your responses. Carefully choose words that do not communicate a judgment around what is being heard (such as, *You're wrong...* or *Yes, but...*); instead, reframe what you heard to gain a new perspective.
- Believe that the coachee is resourceful and able to make required changes.

COMMON TRUST

The coach and the coachee both bring their experiences, perspectives, backgrounds, and personal histories to the coaching relationship. Through common experiences, trust flourishes if nourished in an environment of caring, respect, honesty, and responsibility. Here are five suggestions for building trust in any coaching relationship:

- Follow through on your commitments. Do what you say you will do.
- Tell the truth, no matter how difficult it might be. Truth should be communicated with care and compassion.
- Focus on shared goals. The coaching relationship should be a win-win for the Y, the coach, and for the coachee.
- Alternate perspectives. When a coachee isn't responding positively to the coaching process, step back and look at the coachee's perspective. Look for alternative approaches and tactics that may make a difference. Don't revert to directive behavior.
- Honor confidentiality. The details of what is being discussed are confidential. The broader area of the goals that are being pursued can be shared with the appropriate leadership or supervisor as needed to create a system of support for the coachee. Neither coach nor coachee discloses information, discussions, or progress without mutual agreement.

OPEN COMMUNICATION

The willingness to be authentic, vulnerable, and transparent on the part of both coach and coachee is critical. Admit weaknesses and mistakes to move to a new level of relationship and leadership.

Open communication also involves deep, accurate listening and asking precise, probing, open-ended reflective questions. Excellent coaching requires a high level of communication skills on the part of the coach and a willingness to share openly on the part of the coachee.

Listening in the coaching relationship forms the foundation for great impact in the life of the coachee. Listening actively enables the coach to hear underlying messages that may not be immediately apparent, to pick up on nonverbal cues that may be present, and to effectively mirror what is being said to provide clarity.

If you are preparing to become a coach, consider taking the *Listen First* course to enhance your capacity to ask open open-ended questions, to reflect, and to summarize.

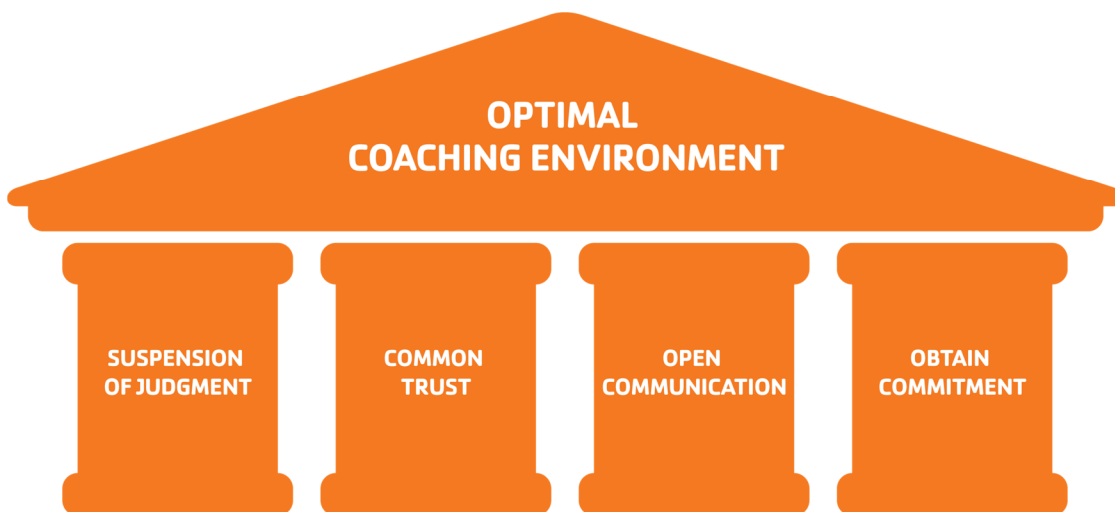
OBTAIN COMMITMENT

As a coach, making a commitment to the coaching relationship and to the determined course of action is essential. Deciding to be a coach means investing time and talent in the development of another person. This investment will have a deep impact. Failure to keep commitments as a coach will break the relationship of trust the coach aims to build.

Coachees likewise make a commitment to actions that will build their leadership competencies.

Measure your level of commitment as coach or coachee to the coaching process with the following questions:

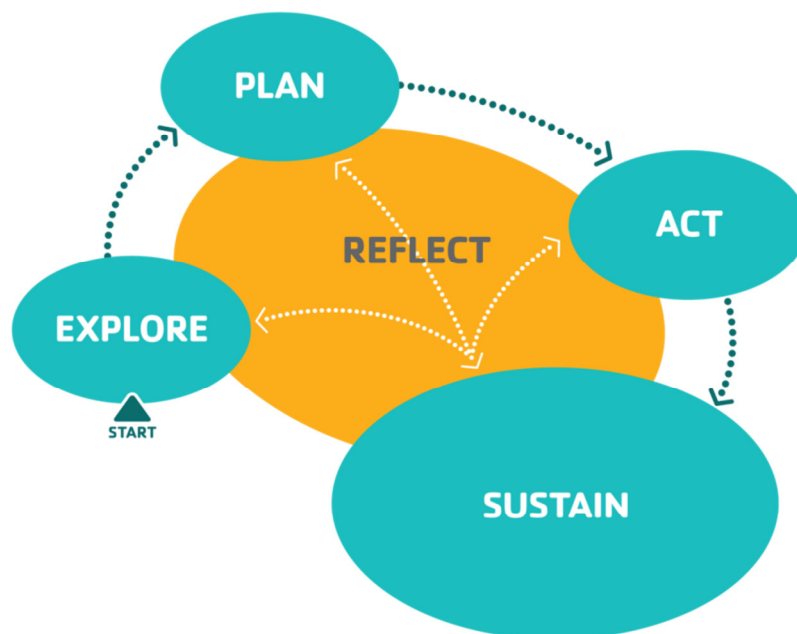
- How do I set an example for my partner in the coaching relationship?
- How do my actions match my words?
- In what ways am I protecting the time for coaching?
- How do I provide honest, caring feedback when needed?



SECTION 4: APPLYING EPAS TO LEADERSHIP COACHING

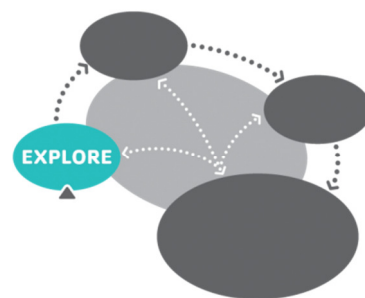
The EPAS model provides a framework for leadership coaching to successfully encourage developing and strengthening leadership competencies among direct reports, peers, volunteers, and others. Each of the four phases of the EPAS model and how it works in the context of leadership coaching is described in detail on the following pages. See the “Leadership Coaching Tools” section for tools to support each phase.

Reflection is not a phase of the leadership coaching model, but rather an essential component of each of the four phases. To sustain an effective coaching relationship, both the coach and the coachee need to continually reflect on the effectiveness of the process. Reflecting involves pausing to “hold up a mirror” to ourselves, as coaches and as coachees, to obtain a view of the process we may not have seen otherwise. This is done through asking questions of ourselves. At the end of each phase you’ll find sample reflection questions to guide this process.



EXPLORE

This phase provides clarity about the coachee's needs, strengths, development areas, and desired results. During the explore phase, the coach and the coachee may consider their common purposes and goals, the current situation and desired future state, and various alternatives for action.



What to expect: You and your coachee will likely start on the explore phase in your first meeting. Depending on the situation, you may finish this phase in the first meeting or schedule additional meetings to explore in greater depth.

You will also make an initial determination as to the length of the coaching relationship, based on your purpose and goals for the coaching. For a simple acquisition of new skills, a three-month period may be appropriate. A more complex development of competencies may require several additional months. This timeline may be modified after you have determined a plan of action.

Tools: The First Meeting, Leadership Coaching Agreement, Question Bank for the Explore Phase

Explore Your Common Purpose

The most important phase in a coaching experience is to define why you are entering into the coaching relationship. Discuss and confirm a clear goal that will be the focus of the work between coach and coachee.

Explore the Current Situation

This is a focused mutual effort by the coach and the coachee to discuss the current situation and identify the desired options for the future. It includes the discovery of information, formally or informally, that tells where the coachee is now, current strengths and development needs, and current level of effectiveness.

Explore Alternatives and Consequences

Once you've established purpose and identified gaps in competencies or behaviors, the coach and coachee explore various alternatives—and their consequences—that can help the coachee reach the desired results. This includes clarifying any limiting beliefs on the part of the coachee as well as the use of various options within the 70/20/10 Learning Model.

- **Understand limiting beliefs of the coachee.** Limiting beliefs are underlying assumptions of the coachee that form an obstacle to forward progress. The coach's goal is to help the coachee identify his or her limiting beliefs and then to understand an

underlying truth that will enable the coachee to move forward in development. Examples of limiting beliefs may include “I can’t do this,” “I am not worthy, smart, or capable,” “It’s never my fault,” or “I am too (any characteristic) to move toward this goal.”

- **Discuss possible alternatives.** The role of the coach during the exploration process is to challenge the coachee to explore a variety of alternatives to further enhance his or her development. Consider framing these alternatives according to the 70/20/10 Learning Model.
- **Select a few alternatives for consideration.** From the list you’ve made, work together to select a few of the various alternatives you’d like to examine further.
 - Which ones most appeal to you?
 - Which ones do you think would be most effective?
 - Which one makes you feel energized about doing it?
- **Explore the consequences of those alternatives.** As you explore various alternatives, recognize that each alternative has potential consequences. Some may be good; others may have a negative impact on the desired outcomes. It is important to delve into the consequences of various alternatives with open-ended questioning. For example, if a coachee is exploring the possibility of practicing delegation as part of a new membership task force, some questions to help explore alternatives include:
 - What are the pros and cons of each alternative?
 - What could go wrong?
 - What are the benefits?
 - What makes this the best project to choose for practicing delegation?

Select the Preferred Alternative

Determine the best course of action to be implemented in the next phase. Be aware that as assessment and exploration progress, the alternative solutions may be different from the original purpose identified for coaching. For example, you may have originally identified learning to influence people as a purpose for coaching. After taking the online *Leadership Competency Assessment* and asking reflective questions, you determine that your purpose will actually be to learn to delegate more, and your alternatives and consequences will reflect that changed purpose.

Reflection Questions

To sustain an effective coaching relationship both the coach and the coachee need to reflect on the process at each phase.



- What am I feeling? What might be creating that emotion?
- How am I contributing to this relationship? How might I be limiting the process?
- What do I need to learn or unlearn in order to gain deeper awareness or insight from this experience?

- What is keeping me from being fully present with this individual?
- How well am I listening in a way that allows me to hear beyond the words being said?
- What are my limiting beliefs about this individual? What are my limiting beliefs about myself in this situation?
- At what level of trust is this relationship? What needs to change in order for that to be enhanced?

FORMAL VERSUS INFORMAL EXPLORATION

To discover information during the explore phase, you can discuss the results of a formal assessment or engage in reflective questioning.

Conducting a **formal assessment** will help identify gaps in needed competencies. Formal assessments document data on the coachee's developmental strengths and needs. Formal assessment options include:

- YMCA *Leadership Competency Assessment* (available on YMCAexchange)
 - Online *Leadership Competency Assessment*
 - Leadership Competency Cards
 - 360° Assessment (coming 2012)
- Resources within your YMCA
 - Performance evaluations
 - Member Satisfaction Survey results
 - Employee Satisfaction Survey results
 - Financial reports
- Outside formal assessments. There are a variety of professional assessments that include personality profiles, behavioral assessments, change style profiles, emotional intelligence assessments, conflict style profiles, and 360° feedback assessments. Most require a certified professional to administer the tool and provide feedback on the results. If 360° feedback instruments are used, they should only be used for developmental purposes, not as performance measurements.

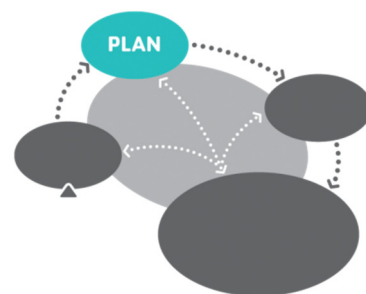
It is not necessary to burden yourself with reams of information from formal assessments. Selecting one or two appropriate options will give ample information for building the foundation for development.

Reflective questioning involves listening and observing common themes that relate back to developmental needs. These questions should be open ended and may serve to clarify priorities, understanding, behaviors, or feelings. They are questions that encourage the coachee to look at the issues involved from a new perspective. Sample questions include:

- What areas were identified by the *Leadership Competency Assessment* as areas of strength? What areas need growth? What surprised you? What didn't surprise you? What do you disagree with?
- What do you need to know to be more effective in your position? To reach your long-term goals? Your short-term goals?

PLAN

During the plan phase, the coach and coachee set specific, measurable, and time-sensitive goals and chart a course of action that will help the coachee reach the desired results.



What to expect: It may be most effective to plan an initial meeting to discuss this phase. Then, the coachee might complete a draft plan, which you can refine together at your next meeting.

Tools: Leadership Competency Development Plan, Question Bank for the Plan Phase

Plan for Action

Once you have explored alternatives and consequences and identified the desired future, together you can design specific, measurable, and time-sensitive goals to bridge the identified gaps.

The coach challenges the coachee to set high, attainable goals. At this phase, responsibilities of both coach and coachee are clearly defined: It is the coachee's responsibility to design a plan of action to develop the needed competencies to achieve the desired outcomes. The coach provides clarity, guidance, and encouragement throughout the planning process.

Hone Actions Steps

Work with the coachee to determine the action steps to be taken in the Leadership Competency Development Plan. Select actions in each of the three areas of the 70/20/10 model: experience-based learning assignments, who can help and how, and formal training. Determine what resources will be needed for each step and how the coachee will measure success.

The following materials will be useful as you work together on the Development Plan:

- *Leadership Competency Assessment* results
- *Leadership Competency Development Guide*
- *Leadership Certification Handbook*
- Identified alternatives for development

Use these questions to ensure that the coachee is on track:

- What new competencies will you develop?
- What new behaviors will be visible?



- What is the timeline for achieving this goal?
- How will you know you are successful?

Consider Benefits

Determine the benefits that will come from these action steps:

- What do you expect to get from this?
- What are the payoffs?
- How will this affect your leadership? Your career? The Y?

Consider Obstacles

Together, brainstorm how the coachee could remove any potential obstacles:

- What could stop you from doing this?
- What could go wrong?
- What might you have to give up to achieve this?

Make a Commitment

Confirm what the coachee has agreed to do and set a timeline to do it. Listen for phrases from the coachee that indicate a lack of commitment such as *I'll try*, *Maybe*, and *It's possible*. Really listen and rephrase the commitment you hear. Ask the coachee, On a scale of 1 to 10, how likely are you to accomplish the activities set in this plan? Depending on how the coachee responds, ask, What will get you at least an 8?

Reflection Questions

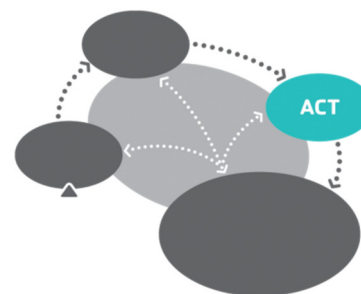
To sustain an effective coaching relationship both the coach and the coachee need to reflect on the process at each phase.



- What am I feeling? What might be creating that emotion?
- How am I contributing to this relationship? How might I be limiting the process?
- What do I need to learn or unlearn in order to gain deeper awareness or insight from this experience?
- What is keeping me from being fully present with this individual?
- How well am I listening in a way that allows me to hear beyond the words being said?
- What are my limiting beliefs about this individual? What are my limiting beliefs about myself in this situation?
- At what level of trust is this relationship? What needs to change in order for that to be enhanced?

ACT

The act phase involves putting one or more alternatives into action through practice and challenging experiences. Coaches and coachees communicate about responsibility, establish ways to be accountable, and set up a system of support for the coachee.



What to expect: Once the coachee is ready to put his or her plan into action, arrange a series of short check-ins (e-mails, phone calls, or informal face-to-face conversations) to ensure accountability for the ongoing progress and to provide resources and support as needed.

Tools: Completed Leadership Competency Development Plan, Completed Action Plan for Goal, Question Bank for the Act Phase

Implement the Plan

Once the plan of action has been agreed upon by both coach and coachee, it is the responsibility of the coachee to put that plan into action. The coach's role becomes one of ensuring accountability and providing support as the coachee undertakes new learning behaviors.

- **Communicate responsibility.** Ask the coachee, What do you need to move forward? When the coachee is ready to act, clearly communicate his or her responsibility for implementation. If not, regain commitment as outlined in the previous section.

Ensure accountability. Both the coach and the coachee have a role in making sure the commitments made in the plan of action happen, but the primary responsibility is with the coachee. As coach, you will set check-in dates and times to encourage your coachee's efforts and evaluate direction. Consider going over the Action Plan for Goal worksheet with your coachee. This will help your coachee home in on one experience from the Leadership Competency Development Plan and focus on the specific outcomes, actions, and completion dates required for that one experience. If you sense that the coachee is just going through the motions or isn't really committed to the plan, go back to the commitment stage at the end of the plan phase and spend time determining what obstacles are blocking progress. Review how you both will measure progress and evaluate achievements.

Continue the Coaching Relationship

As the coachee moves into action on the plan he or she developed, the coaching relationship continues to ensure that the coachee has the resources and support necessary for success.

- **Demonstrate support.** While learning and practicing new behaviors, the coachee needs your support and the support of the people in the workplace. During this period, the coachee’s performance may decrease as he or she practices and learns the newly identified competencies and behaviors.
- **Provide resources.** Resources may include time, training, reading materials, equipment, and the like. Communication with supervisors, peers, and direct reports about goals, plans, and evaluation of achievements is essential.

Research from the Center for Creative Leadership has demonstrated that coachees are often in a comfort zone as they approach new developmental experiences.⁶ They may already know how to do their jobs well, and their development plans are designed to challenge them to the next level of performance.

As some coachees confront the learning challenges and accompanying stress, they may experience a temporary drop in performance. This occurs as they gain new competencies, build additional skills, and learn to change their behavior. As a coach, it is important to understand that if a system of support that includes the coachee’s peers and supervisor is not built around the coachee during this time, the drop in performance may have negative consequences on the coachee’s career. Supporting the coachee as he or she changes, grows, and develops enables him or her to achieve a higher level of performance after the coaching experience.

⁶ *Coaching for Results, Maximizing the Development Process.* Center for Creative Leadership, 2001.

Reflection Questions

To sustain an effective coaching relationship both the coach and the coachee need to reflect on the process at each phase.

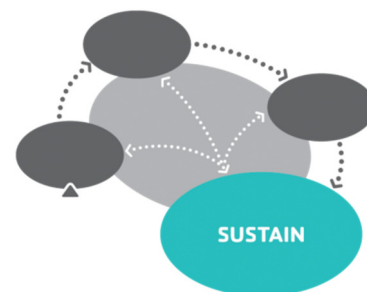


- What am I feeling? What might be creating that emotion?
- How am I contributing to this relationship? How might I be limiting the process?
- What do I need to learn or unlearn in order to gain deeper awareness or insight from this experience?
- What is keeping me from being fully present with this individual?

- How well am I listening in a way that allows me to hear beyond the words being said?
- What are my limiting beliefs about this individual? What are my limiting beliefs about myself in this situation?
- At what level of trust is this relationship? What needs to change in order for that to be enhanced?

SUSTAIN

The sustain phase gives coachees a sense of safety that allows them to take risks and the encouragement to persist at the hard work of change. Coaches support the coachee by encouraging improvement, celebrating successes, and helping to reassess action steps as needed.



What to expect: Plan to check in periodically to assess progress, provide support and encouragement, and reassess the coachee’s action steps if necessary.

Tools: Coaching Reassessment Questions, Question Bank for the Sustain Phase

Sustain the Development

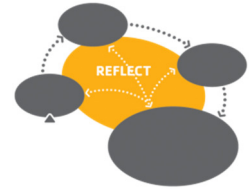
The job of the coach is to encourage and celebrate the coachee’s successes as he or she makes progress toward desired outcomes. At some point, it may be necessary to reassess and modify the plan of action as progress is made.

- **Give encouragement.** The ability to encourage—to inspire with courage and hope—is one of the most powerful coaching skills. Individuals flourish and develop under these conditions. Encouragement is given by consistently practicing:
 - Verbal support: “You’ve successfully launched new initiatives before and you can certainly do it again.”
 - Approval: “Your goals are worth the effort and will result in great advancement.”
 - Speaking hope: “You have the choice of going forward with hope or of giving up. Choosing hope would....”
 - Empowerment: “You have the background necessary to understand this issue. What would you do....”
 - Affirm: “Way to go! You helped the team do an excellent job on that project. The detail and forethought you put into it made it very effective.”
 - Focus on the coachee, not the coach: “You did well” rather than “I like the way you did that.”
- **Celebrate successes.** It is important to celebrate both small and big wins as the coachee develops new competencies and behaviors. Celebration can be as simple as verbal congratulations on a job well done or may involve a more formal recognition of achievement.
- **Reassess action steps as needed.** The coach will also assist in reassessing action steps made in the plan. As progress is made, obstacles may become apparent, requiring new strategies. As in all coaching, asking questions can generate momentum. Use the

“Coaching Reassessment Questions” in the “Leadership Coaching Tools” section as a format for this discussion.

Reflection Questions

To sustain an effective coaching relationship both the coach and the coachee need to reflect on the process at each phase.



- What am I feeling? What might be creating that emotion?
- How am I contributing to this relationship? How might I be limiting the process?
- What do I need to learn or unlearn in order to gain deeper awareness or insight from this experience?
- What is keeping me from being fully present with this individual?
- How well am I listening in a way that allows me to hear beyond the words being said?
- What are my limiting beliefs about this individual? What are my limiting beliefs about myself in this situation?
- At what level of trust is this relationship? What needs to change in order for that to be enhanced?

SECTION 5: WHEN LEADERSHIP COACHING WORKS BEST

Leadership coaching focuses specifically on leadership development, and it works best when it is used by staff and volunteers who want to improve their performance.

COACHEE CHARACTERISTICS

Coachees are people who want to improve—to build skills, to contribute to a team or group, to help attain a vision, to attain the highest level of performance possible. They are willing and ready to be coached, and they respect the process. If three or more of these characteristics describe a potential coachee, he or she is an excellent candidate for leadership coaching:

- Demonstrates potential and needs new resources to go to the next level
- Demonstrates a desire to learn, grow, and develop new capabilities
- Has goals and is willing to make changes to meet those goals
- Is action oriented
- Learns from others
- Deals well with change
- Takes initiative
- Thrives when given new challenges and assignments
- Expresses interest in a better work-life balance
- Has good ideas but experiences difficulty moving from ideas to action
- Needs encouragement to find new ways of doing things

Commonly a leadership coaching relationship evolves between a supervisor and direct reports. However, leadership coaching also occurs under different circumstances, such as between peers or between staff from two different departments.

When leadership coaching occurs between staff members *not* in a supervisory relationship, it's imperative the supervisor is aware of the coaching relationship and able to provide support and encouragement as necessary. In this situation, the supervisor should be kept informed of how the leadership coaching is progressing.

ALTERNATIVES TO LEADERSHIP COACHING

Leadership coaching is not necessarily the best way to address every issue or challenge a staff member or volunteer may face. In some cases, alternative approaches for providing support, addressing performance issues, or caring for the health and wellness of employees and volunteers are more appropriate choices.

Some situations for which leadership coaching is not an appropriate solution include:

- Mental health issues
- Resistance to or disregard of feedback
- Desire to win at all costs, even at the expense of peers
- Command-and-control leadership style as part of a team
- Extreme lack of self-confidence or sense of vulnerability
- Laying blame for problems on others
- Character issues
- High levels of personal or family stress
- Lack of self-awareness to identify areas for improvement

Well-being coaching or counseling may be viable options for those who consistently demonstrate these behaviors.

WHEN NOT TO COACH

- In a crisis situation
- When illegal or unethical behavior is exhibited
- In instances of extreme hostility or violence
- When the coach or coachee is angry

SECTION 6: EVALUATING EFFECTIVENESS

According to research, the top three indicators of successful coaching are:⁷

- increased self-awareness and understanding;
- sustained behavioral change and increased capacity; and
- more effective leadership through increased competency.

In *Coaching That Counts*, Dianna Anderson and Merrill Anderson suggest the following four measurements to determine the effectiveness of a coaching program:⁸

- Measure the initial reaction of coaching participants. Sample survey questions include:
 - My coach and I set goals for coaching.
 - My coach and I connected and established a trusting relationship.
 - The first two sessions of coaching provided a strong foundation for progress.
 - The assessment information was helpful for me in developing a plan.
- Measure what the coachee learns:
 - I understand how to be a more cause-driven leader.
 - I am gaining personal insights into changes I need to make.
 - I understand how to more effectively...
 - Coaching is enabling me to explore new ways to...
- Measure how the coachee has applied what he or she has learned:
 - Describe the performance improvements you've made as a result of coaching.
 - Describe the new competencies you've gained as a result of coaching.
 - Describe how coaching has enabled you to be more effective in your current role.
- Measure the impact on the Y's goals, productivity, and mission:
 - Describe how coaching specifically affected Y performance (for example: improved close rates in membership, improved financial results in a department, improved staff turnover rates, etc.)

⁷ Bacon, Terry R. *Measuring the Effectiveness of Executive Coaching*. White Paper, Durango, CO: Lore International Institute, 2003.

⁸ Anderson, Dianna, and Merrill Anderson. *Coaching That Counts: Harnessing the Power of Leadership Coaching to Deliver Strategic Value*. Burlington, MA: Elsevier Butterworth-Heinemann, 2004.

LEADERSHIP COACHING TOOLS

The tools in this section are organized to correspond to the four phases of the EPAS coaching model. In addition, you will find a worksheet for tracking coaching meetings and a set of statements you can use to self-evaluate your readiness to be a coach.

EXPLORE

- The First Meeting
- Leadership Coaching Agreement (Sample)
- Leadership Coaching Agreement (Blank)
- Question Bank for the Explore Phase

PLAN

- Leadership Competency Development Plan (Sample)
- Leadership Competency Development Plan (Blank)
- Question Bank for the Plan Phase

ACT

- Action Plan for Goal (Sample)
- Action Plan for Goal (Blank)
- Question Bank for the Act Phase

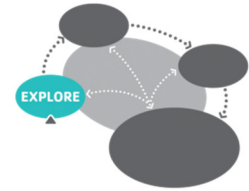
SUSTAIN

- Coaching Reassessment Questions
- Question Bank for the Sustain Phase

OTHER TOOLS

- Coaching Meetings Record
- Coaching Readiness Self-Assessment

THE FIRST MEETING



Preparation

Ask yourself these questions as you consider entering a coaching relationship:

- What do I know about my potential coachee?
- What do I value and respect about the coachee?
- What obstacles must I remove to commit my time, experience, and wisdom to this relationship?
- Will I do all I can to support, encourage, and sustain the development of this coachee?
- What is the purpose and goal of this coaching relationship?
- What are the Y's goals for the coachee and the coachee's career?

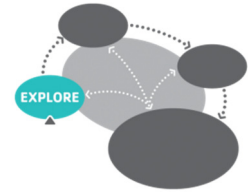
The Actual Meeting

The first meeting sets the tone for all future coaching interactions. Taking the time to carefully lay a strong foundation will greatly increase the effectiveness of the coaching effort. The questions below will help in reaching agreement on how each will operate in the coaching relationship, what the purpose of coaching will be for the coachee, the desired outcomes of the Y, and what assessments will be used to determine next steps.

Questions that can help to set the boundaries of the relationship include:

- How will we work together to communicate, provide feedback, and demonstrate appreciation for each other?
- What is the expected outcome and what is the expected timeline for accomplishment?
- How will we move forward to assess strengths, developmental needs, and current leadership capacity?
- What is working or not working now?
- What new competencies identified by the *Leadership Competency Assessment* results will be part of this effort?
- What new behaviors are required for you to be successful?
- What are the boundaries we will establish regarding missed appointments, phone calls, or deliverables?
- What are the concerns each party has about this coaching relationship?
- How will we evaluate the coaching relationship? How often?
- If expectations are not met by either party, what actions will we take?
- How will we hold each other accountable?
- What will occur if the coaching relationship is breached by either party?

LEADERSHIP COACHING AGREEMENT (SAMPLE)



Date: _____ **Coach:** _____ **Coachee:** Pat _____

Defined purpose of this coaching relationship:

- Develop additional listening skills
- Learn to accomplish objectives through formal and informal networks

What do we want to happen?

- Position Pat for next role as executive director in the Y
- Enhance current skills in relation to increased responsibilities as associate executive
- Strengthen capacity to influence board volunteers and superiors

When do we want to achieve this?

- Over course of next 12 months

Any new behavior coachee needs to display?

- New listening behaviors
- New ability to develop informal networks

How often will we meet? How will we meet? Duration

- Duration: 1 year min.
- Meet face-to-face quarterly, talk via SKYPE every other month

Agreements on confidentiality:

- Conversations are confidential
- Goals and needed support systems will be shared with current supervisor

What happens if someone has to cancel?

- Reschedule at time of cancellation or within 48 hours

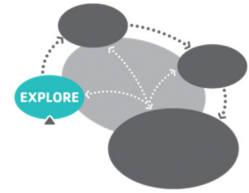
Who else needs to be involved?

- COO as needed

What could go wrong? How do we make it right?

- Missed meetings, failure to communicate
- Stay focused, keep it a priority, schedule recurring meetings or send e-mail reminders

LEADERSHIP COACHING AGREEMENT (BLANK)



Date: _____ **Coach:** _____ **Coachee:** _____

Defined purpose of this coaching relationship:

What do we want to happen?

When do we want to achieve this?

Any new behavior coachee needs to display?

How often will we meet? How will we meet?

Duration:

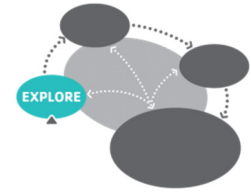
Agreements on confidentiality:

What happens if someone has to cancel?

Who else needs to be involved?

What could go wrong? How do we make it right?

QUESTION BANK FOR THE EXPLORE PHASE



Questions for assessing the current situation:

- What do you see as your greatest strengths?
- What are your developmental goals?
- Why are these skills important to you?
- How will developing them benefit you and the Y?
- What do you want to get out of this experience?
- What challenges are you dealing with now on the job?
- How is this new challenge making you feel?
- How can meeting this challenge benefit you and the Y?
- On a scale of 1 to 10, how important is meeting this challenge?
- What obstacles are you currently struggling with? How can you overcome those obstacles?
- Given your background and experience, what challenges will you face as you reach for your goals?
- Are there any areas where you find that actions and decisions don't come easily?
- In what way(s) are you currently stretching to get out of your comfort zone?
- How does your job fit with the Y's mission, values, and vision?
- How does your approach with people affect your relationships? What does your approach look like?
- Are your self-assessments in alignment with the hard assessment data?
- How do you see this process affecting your long-term career objectives?
- What might make change difficult in this area?
- What interpersonal, reputation, or skills obstacles have you run into in your past career? How did you address these obstacles? What solutions did you identify?
- When have you been most successful in this area?
- Step back and take an honest look at this area: Is this a one-time issue for you, or something you struggle with a lot?
- What skills or experiences do you feel you want or need to advance?

360° survey questions:

- What did you learn about yourself?
- What did you learn about how others perceive you?
- Did you have any attitudes or perceptions that were validated or challenged?
- Did you identify an "aha" about yourself, something that you had not previously considered?

Questions for exploring alternatives:

- Who can help you meet your goal?
- What will you have to overcome?
- What new behaviors or skills will you need to acquire?
- What old behaviors will you need to relinquish?
- What new and different perspectives might you need to understand?
- Who can help you add the desired challenges to your job?
- Who would be a great role model?
- How should your supervisor be involved?
- What do you suspect may be causing this block?
- What resources will you need to accomplish this task?
- Who else could you ask for advice and counsel?
- What are various ways you could approach this situation?
- If you knew you wouldn't fail, what would you do?
- What would the path of least resistance look like?
- What is the most important thing to do here?
- What would you do if you had more resources?
- Which alternative is most likely to help you achieve your objective?
- Is this choice aligned with your personal values? With the values of the Y?
- What are your alternatives?
- What behavior or attitude have you identified that you should change to meet your objectives?
- What gaps have you identified between your current level of performance and needed changes?
- What might it take to bridge that gap?
- What other ideas can you think of for developing this skill?

Questions for exploring consequences:

- What are the potential positive consequences?
- What are the potential negative consequences?
- How might those consequences affect your actions?
- What might your actions imply to others?
- Who might stand to benefit by your actions?
- How will you know the impact of your actions?

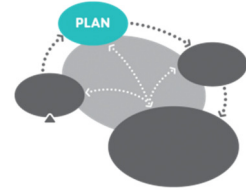
- Who might help you identify other possible positive or negative consequences? How can they assist you?
- What knowledge, experience, or advice do you need to seek to understand the impact of your actions?
- What will you have to give up to reach your goal?
- What if there were no consequences?

LEADERSHIP COMPETENCY DEVELOPMENT PLAN (BLANK)

NAME: [Click here to enter your full name.](#)

LEADERSHIP LEVEL in CURRENT ROLE: [Choose a Leadership Level.](#)

Assess Development Opportunities Using 70/20/10 Learning Model: Refer to the <i>Leadership Competency Development Guide</i> for more information about the 70/20/10 Learning Model, including suggested experience-based learning assignments, key coaching questions, formal training, self-study, and valuable tips.						
I. Leadership competency to develop	II. Experience-based assignments (70%)	Target dates	III. Who will you ask to help? And how? (20%)	Target dates	IV. Formal training and self-study (10%)	Target dates
(a) Choose a Leadership Competency. <hr/> (b) Behavior description(s): <ul style="list-style-type: none"> Click here to enter text. Click here to enter text. 	1. Click here to enter experience-based assignment. 2. Click here to enter experience-based assignment.	Click here to enter a date. Click here to enter a date.	1. Click here to enter text. 2. Click here to enter text.	Click here to enter a date. Click here to enter a date.	1. Click here to enter text. 2. Click here to enter text.	Click here to enter a date. Click here to enter a date.
Select Leadership Certification: <input type="checkbox"/> Working toward achieving a new Leadership Certification <input type="checkbox"/> Maintaining current Leadership Certification with 20 Leadership Certification Credits every 5 yrs & Assessment Select Leadership Certification you're working toward achieving or maintaining: <input type="checkbox"/> Team Leader <input type="checkbox"/> Multi-Team or Branch Leader <input type="checkbox"/> Organizational Leader						



QUESTION BANK FOR THE PLAN PHASE

- Who will be affected by your success?
- How will you know when you've achieved your goal?
- How will you engage your team? Others?
- How will you seek assistance to achieve this goal?
- How will you equip or educate yourself to succeed?
- How will you hold yourself accountable for achieving this?
- How will we know when you are off track?
- What is a realistic goal to set?
- What would success look like?
- What would be most helpful for you to walk away with today?
- How will we measure the effectiveness of the plan?

ACTION PLAN FOR GOAL (SAMPLE)



Highest priority To gain a deeper appreciation for volunteerism

Goal to achieve	To become a volunteer for an organization; to volunteer at least 15 hours during the year	
Expected outcomes (What you hope to learn or accomplish)	Connection with a YMCA or other organization that needs volunteers Relationship with a volunteer organization	
Specific actions I will take	Ask YMCA staff who volunteer about recommendations for volunteering Contact identified organization to learn about volunteer opportunities	Commit to specific dates and times for volunteering
Target completion date(s)	June 2011	
Who will assist you?	TBD	
How will they assist you?	Provide information and opportunities to volunteer	

What will success look like for you when this is completed? I will have started a relationship for volunteering. I will have volunteered for at least 15 hours.

Participant Signature

Date

ACTION PLAN FOR GOAL (BLANK)



Highest priority

Goal to achieve		
Expected outcomes (What you hope to learn or accomplish)		
Specific actions I will take		
Target completion date(s)		
Who will assist you? How will they assist you?		

What will success look like for you when this is completed?

Participant Signature

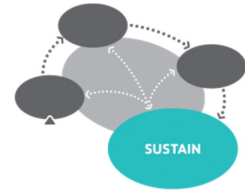
Date

QUESTION BANK FOR THE ACT PHASE



- What do you need to move forward?
- Are the measures of the results on target?
- Are different metrics needed?
- How are you progressing?
- Is any additional assessment needed to move forward?
- Are the chosen actions steps appropriate?
- At what point do we need to reassess the alternatives and plans you've chosen?
- What are you struggling with in this part of the plan?
- What needs more focus and commitment?

COACHING REASSESSMENT QUESTIONS



CONTINUE:

Which actions steps are producing a positive, measurable effect?

DEVELOP:

What additional alternatives and actions steps may be needed?

CHANGE:

Which actions steps are not being done? What are the obstacles that need to be overcome?

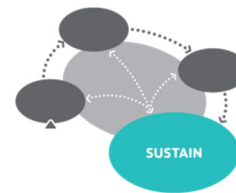
ELIMINATE:

Which action steps are not working?

Additional questions:

- Is movement happening or is the plan stalled?
- Are your energy and enthusiasm increasing or decreasing?
- Have new conditions at work resulted in the need for a revised plan of action?
- How can we celebrate big and small successes? How do you prefer to celebrate?

QUESTION BANK FOR THE SUSTAIN PHASE



- What is your assessment of your progress?
- What part of the plan is working?
- Are the chosen actions steps still appropriate?
- What obstacles have you encountered?
- What will it take to remove those obstacles?

COACHING MEETINGS RECORD

Coachee _____ Coach _____

Coaching objective: _____

Summarize and record discussions and agreements during the coaching process. Indicate where you are in the process: Explore, Plan, Act, or Sustain.

Date	Coaching meeting summary	Next steps	Due date

COACHING READINESS SELF-ASSESSMENT

Before committing to be someone's coach, ask yourself, Am I ready to coach? If an honest assessment indicates that you are not the best coach for an individual or in a specific situation, a different coach may need to be engaged to assist this person. Coaches are most effective when they:

- Allocate sufficient time to prepare for, work with, and follow-up with the person they are coaching
- Are willingly accessible at least some time outside of scheduled meetings
- Are ready to listen and to encourage learning, and not just tell the coachee what to do
- Model the types of behaviors they expect from the person they are coaching
- Are genuinely interested in helping the coachee succeed
- Are respected by the person they will be coaching
- Respect the person they will be coaching
- Understand the needs and goals of the person being coached
- Possess the necessary expertise for the particular coaching need (which may or may not require specific job expertise or knowledge) or know how to access appropriate assistance
- Know how to coach (e.g., what questions to ask and ways to engage the person being coached)
- Are viewed as "safe," as someone with whom the coachee can be open and honest (note: this is sometimes difficult when coaching someone you also evaluate)
- Can challenge and provide feedback to the coachee (note: this is sometimes difficult when coaching someone in a senior position)