



Ramsey County Intermediate Coaching Training

STAFF RESOURCE GUIDE

October 2015

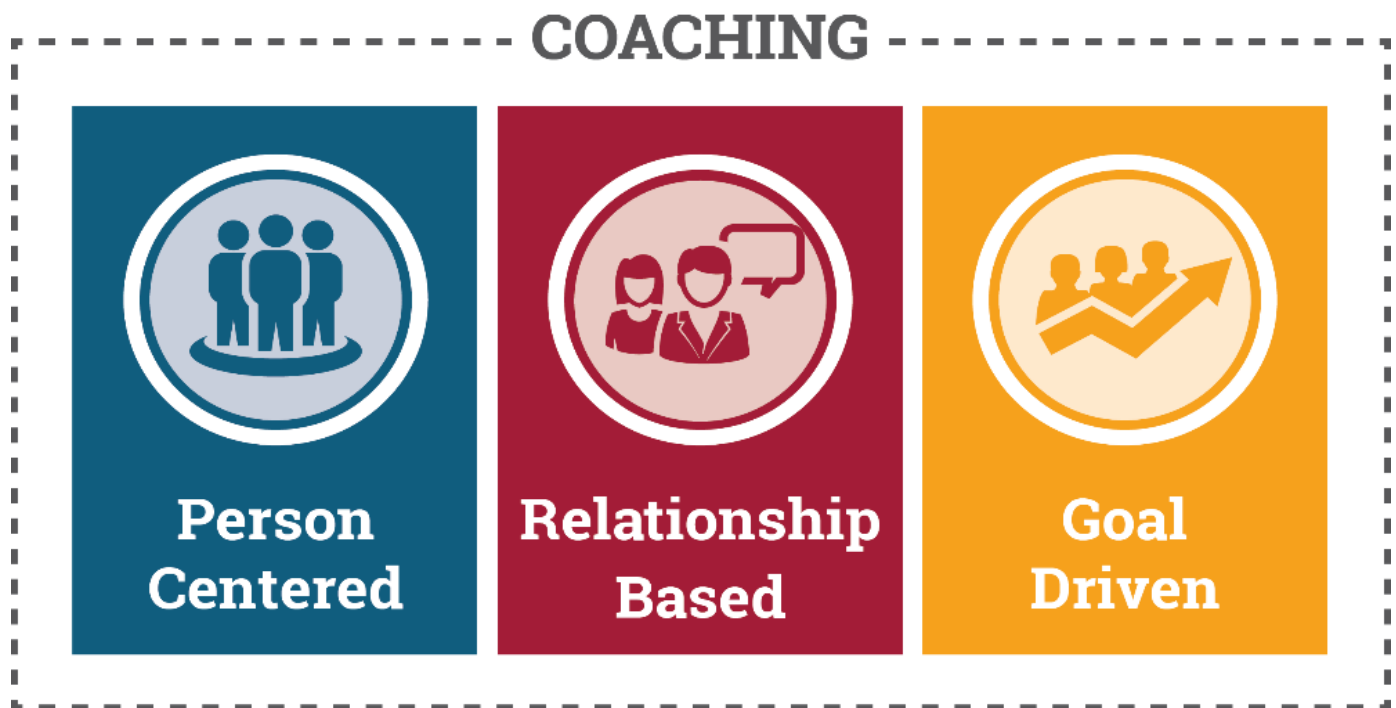
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General Coaching Resource



Coaching Framework

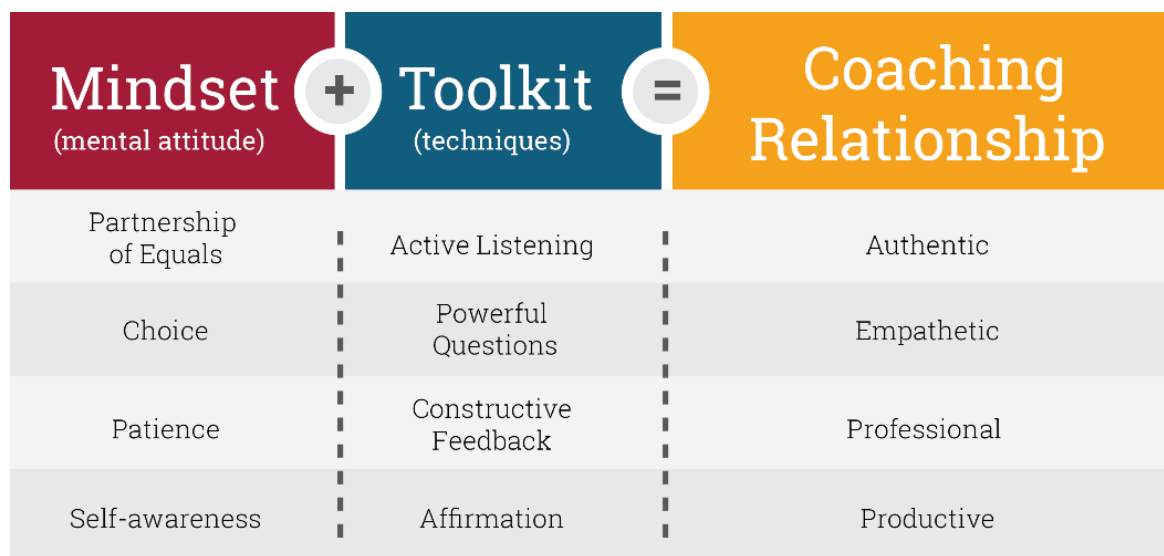
Framework



Person-Centered

1. Seek to recognize the participant's unique dreams, resources, and strengths.
2. Unleash the power in others - power exists within each participant.
3. Progress is made when participants own their choices, decisions and goals.
4. Encourage and praise progress, even if it is slow and takes place over time.
5. Maintain perspective in the presence of setbacks, recognizing that setbacks are part of the process of working towards goal accomplishment.

Relationship-Based



Goal-Driven

1. Action-oriented
2. Future focus: Attention is on moving forward, not looking backward
3. Responsibility
 - a. Participant Responsibility
 - Goal identification
 - Goal achievement
 - b. Coach's Responsibility
 - Goal guidance
 - Encouragement
 - Accountability



Core Coaching Techniques



Intermediate Coaching Training

Lesson One



Helpful Tips

Reflective Statements

“Reflective listeners work to understand, in an empathic way, whatever the person is saying from the speaker’s viewpoint or internal frame of reference. Beyond empathy, however, the listener **accepts** what the speaker is saying without agreeing or disagreeing. Responding reflectively means picking up on the **feelings** contained in what the speaker is saying and not just facts or ideas. It means zeroing in on the personal elements of the speaker’s statements, not the interpersonal, and responding with acceptance and empathy rather than indifference or judgment.”

~ Dawson & Guare

Reflections Help Coaches:

- Build rapport
- Gain a deeper understanding of what the participant is experiencing
- Convey respect to the participant’s expertise of his/her own life
- Keep conversation positive and moving forward; unlike questions, they are less likely to heighten resistance
- Clarify and get on the same page as the participant
- Direct the participant toward positive action and problem solving

Examples of Reflections:

Participant: *I’m so, SO sorry I’m late. The bus broke down, and I had to walk to the next stop and then wait for the next bus. It took me an hour and a half longer than I thought it would to get here, and it was so hot out! I’m really so tired and annoyed. I hate public transportation.*

- *Simple Reflection 1:* The bus broke down and that is why you are late.
- *Simple Reflection 2:* You’re hot and tired.
- *Rephrasing:* You came here on public transportation today and things didn’t go as smoothly or quickly as you planned.
- *Paraphrase:* You had trouble getting here today.
- *Reflection of feelings 1:* Something happened that was outside of your control and that negatively affected your day. That is stressful and frustrating to you.
- *Reflection of feelings 2:* You really wanted to be here on time.
- *Overstatement:* Sounds like you feel the day is ruined because of this.
- *Understatement:* Sounds like the buses caused a slight inconvenience for you in your life.



Reflective Statements : Real Play

Instructions

1. Get into groups of three.
2. Determine roles for first real play and then switch roles until everyone has been in each role.

Roles:

- **Coach:** Will actively listen and use ONLY reflective statements.
- **Speaker:** Will talk about something slightly frustrating for them that they are willing to talk about. The conversation should last about five minutes.
- **Observer:** Will observe the coach and provide constructive feedback, using the observer checklist below.

* * * * *

Observer Checklist for: _____

- ☐ Only used reflective listening statements
- ☐ Conveyed respect for the speakers view point
- ☐ Neither agreed nor disagreed with the speaker
- ☐ Reflections led the speaker to reveal additional feelings, motivations or challenges, leading to greater insight on the issue.
- ☐ Avoided “traps” (for example, advice giving and judging.)

What kinds of reflective statements were used? _____

Ask the speaker how they felt when reflections were used. What was the experience like? _____

Did they “notice” that the reflective statements were being used...was it natural? _____



Useful Summarizing Phrases

Examples of Summarizing Phrases:

- I think it would be useful to summarize where we've got to here...
- There seem to be three or four main views that you have been putting forward...
- Can I check that I've really understood the points you're making here? What you feel is that...
- So, to summarize so far...
- So, what I'm hearing is that....
- So, you feel angry/sad/happy/frustrated about this?
- What I think I hear you saying is.....

Note: Ending on a question often prompts further significant disclosure from the participant. This is because it demonstrates authentic listening and therefore encourages the participant to tell you more.

- Is that correct?
- Did I get that right?
- Is that a fair summary?
- Am I understanding you correctly?

Additional Tips:

- Use the same language. If they call their boss "slimy", use the same word in your summary.
- Summarize tone and emotion you hear as well as content.
- Summarize from the participant's view point.
- Avoid interpreting or adding additional meaning to the summary.



Summary Statements : Real Play

Instructions

1. Get into groups of three.
2. Determine roles for first real play and then switch roles until everyone has been in each role.

Roles:

- **Coach** : Will actively listen and use ONLY summary statements
- **Speaker**: Will talk about something slightly frustrating for them that they are willing to talk about. The conversation should last about five minutes.
- **Observer**: Will observe the Coach and provide constructive feedback, using the observer checklist below.

* * * * *

Observer Checklist for: _____

- ☐ Only used summary statements
- ☐ Conveyed respect for the speakers view point
- ☐ Neither agreed nor disagreed with the speaker
- ☐ Was short and to the point
- ☐ Use the same language as the participant
- ☐ Summarized tone and emotion as well as content
- ☐ Summarized from the participant view point
- ☐ Avoided interpreting or adding additional meaning to the summary
- ☐ Summaries organized the speakers' thoughts, feelings and challenges

Did the speaker use any summary phrases? If so what were they?

Ask the speaker how they felt when summary was used. What was the experience like? _____



Helpful Tips

Examples of Powerful Questions

This list of open-ended, powerful question can help participants gain deeper insight and self-direct. These questions can help you better assess the participant's strengths and needs and help them with identifying, articulating, and developing their goals.

The categories marked with an asterisk () are questions that can be especially helpful in cases where the participant may have mental health challenges that may require a different approach.*

Beginning Discussion <ul style="list-style-type: none"> - What's happened since we last spoke? - What would you like to talk about today? - What would you like to focus on today? 	Clarification/Elaboration <ul style="list-style-type: none"> - What do you mean by that specifically? - Can you tell me a little more about this? - What else? - What are some other thoughts or feelings you have on this?
Evaluation <ul style="list-style-type: none"> - How does this align with your goals? - What is the opportunity/challenge in this situation? - What do you think that means? 	Exploration <ul style="list-style-type: none"> - What are your options? - What other angles can you think of? - What is here that you want to explore? - What other things come to mind?
History <ul style="list-style-type: none"> - What have you tried so far? - What do you think triggered it? - How did it start? - What happened leading up to it? 	Hope* <ul style="list-style-type: none"> - Tell me about a time when you felt hopeful? - How does hope impact your actions? - How role does hope play in your next step/decision?
Implementation/Planning <ul style="list-style-type: none"> - What will you do to get started? - What is your action plan? - What is next? - How could you improve this plan? - What will you need to do this? - When will be the best time? - What will be the first step? 	Learning <ul style="list-style-type: none"> - What will you take away from this? - What lessons will take with you? - If you could do this over again, how would you handle things? - If it had been you, what would you have done? - If you had the choice what would you do? - What would you do if you could start over?
Life Meaning/Purpose* <ul style="list-style-type: none"> - What would give your life more meaning? - What would you consider the purpose for your life? - What words would you use to describe a meaningful life? 	Motivation* <ul style="list-style-type: none"> - What things make you smile? - What energizes and motivates you? - Share a time when you felt proud of yourself? What made you proud?

Reflection: <ul style="list-style-type: none"> - What are your thoughts about this? - How do you feel about it? - How does it look to you? 	Resources <ul style="list-style-type: none"> - What resources are available to you? - What resources do you need in order to make a decision? - What support system do you have?
Obstacles: <ul style="list-style-type: none"> - What's holding you back? - What is the greatest challenge? - What are you the most concerned about? 	Outcomes <ul style="list-style-type: none"> - What is your desired outcome? - What does success look like? - How will you know you've reached your goal?
Self-reflection:* <ul style="list-style-type: none"> - What would you change about your life? - What are you holding on to that you no longer need? - What do you focus your attention and energy on? - What are you in control of? 	Summary <ul style="list-style-type: none"> - How would you describe the results? - How would you summarize things? - What conclusions have you drawn? - How did that go?
Taking Action <ul style="list-style-type: none"> - Where do you go from here? - What are your next action steps? - How would you like to move forward? 	Values:* <ul style="list-style-type: none"> - What are your core values? What do they mean to you? - What are your thoughts/feelings about family, health, work, friendship? - What are you currently doing to honor your core values? - How does this fit in with your life plan?



Reflect and Plan: Applying Powerful Questions

1. Work independently.
2. Pick five different “boxes” from the Examples of Powerful Questions tip sheet.
3. Pick a question from each box.
4. Consider a situation where this question might be useful for you.
5. Share one situation with a partner when you are finished.

Example:

Box: Resources.

Question: What resources do you need to help you decide?

Situation: I could use this question when a participant comes to me unsure of what community service site to volunteer at.

Box:

Question:

Situation:

Box:

Question:

Situation:

Box:

Question:

Situation:

Box:

Question:

Situation:

Box:

Question:

Situation:



Powerful Questions: Real Play

Instructions

1. Get into groups of three.
2. Determine roles for first real play and then switch roles until everyone has been in each role.

Roles:

- **Coach:** Will actively listen and use ONLY “powerful questions.”
- **Speaker:** Will talk about something slightly frustrating for them that they are willing to talk about. The conversation should last about five minutes.
- **Observer:** Will observe the Coach and provide constructive feedback, using the observer checklist below.

* * * * *

Observer Checklist for: _____

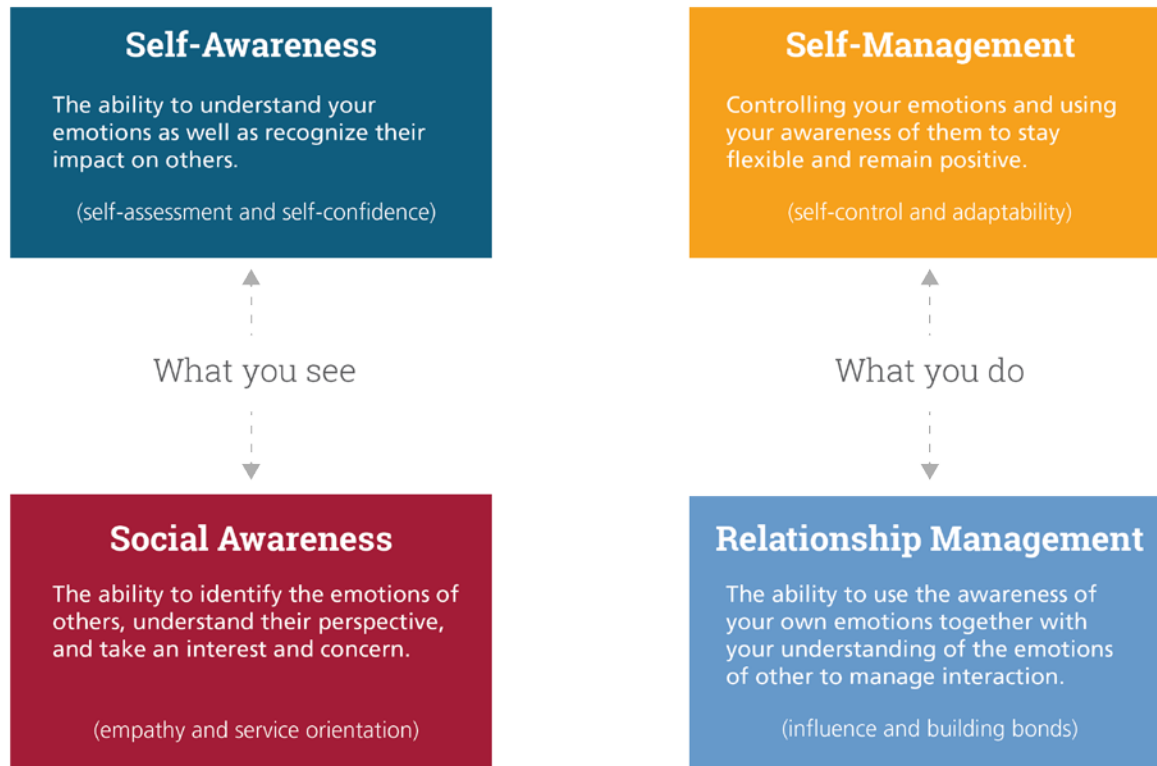
- ☐ All questions were open-ended
- ☐ Questions did not include advice-in-disguise
- ☐ Questions were non-judgmental and respected the speaker’s autonomy
- ☐ Questions were short – only one question per statement.
- ☐ Avoided the “question-answer” trap
- ☐ Questions encouraged the speaker to self-reflect, self-discover
- ☐ Questions encouraged problem ownership and problem solving

What was the coach’s greatest strength? What do you think is a growth area?

Ask the speaker how they felt about the questions that were used. What did the experience feel like?



Emotional Intelligence: The Four Core Components





Assessing Your Emotional Intelligence

Instructions: *This Emotional Intelligence Assessment is designed to give you a general idea of your EQ strengths. Please read each statement below and mark the number that best describes how you feel about the statement.*

Self-Awareness <i>My Self-Awareness Score: _____</i>	Never	Rarely	Sometimes	Often	Always
I can identify and describe how I am feeling almost all of the time.	0	1	2	3	4
Emotions are an important part of my life.	0	1	2	3	4
I know what things tend to trigger negative emotions in me.	0	1	2	3	4
I am aware when my emotions are impacting others.	0	1	2	3	4
I am can easily tell when something has upset me.	0	1	2	3	4
I know that I am more than my thoughts and feelings and I can examine them as a separate and logical third party.	0	1	2	3	4
I know what external events of the day have impacted the way I feel.	0	1	2	3	4
I can easily sense when I'm becoming angry.	0	1	2	3	4
I readily tell others what I truly, genuinely feel.	0	1	2	3	4
I can immediately identify when I take my stress out on other people.	0	1	2	3	4
Self-Management <i>My Self-Management Score: _____</i>	Never	Rarely	Sometimes	Often	Always
It is easy for me to make goals and stick to them.	0	1	2	3	4
I would describe myself as an emotionally balanced person.	0	1	2	3	4
I stay positive, calm and optimistic when things don't go as planned.	0	1	2	3	4
I find it easy to accept responsibility for the way I react.	0	1	2	3	4
I usually accept critical comments from others without feeling angry.	0	1	2	3	4
I do not overindulge in things that could damage my well-being.	0	1	2	3	4
I direct my energy into positive outlets, like creative work or hobbies.	0	1	2	3	4
Even when I am stressed, I find it easy to remain composed.	0	1	2	3	4
I don't let issues that do not directly affect me get me down.	0	1	2	3	4
When something makes me angry, I am able to calm down and move on quickly.	0	1	2	3	4

Social Awareness		Never	Rarely	Sometimes	Often	Always
<i>My Self-Awareness Score: _____</i>						
I think about how my actions effect the people around me.		0	1	2	3	4
I am good at knowing when to voice my opinion and when not to.		0	1	2	3	4
I can genuinely apologize when I have hurt someone's feelings.		0	1	2	3	4
I understand when plans change and do not take it personally.		0	1	2	3	4
Most of the time, I easily understand and relate to other's feelings		0	1	2	3	4
I show heartfelt interest in the challenges and successes of loved ones.		0	1	2	3	4
It genuinely bothers me to see other people sad or hurting.		0	1	2	3	4
I know when I've annoyed someone almost instantly.		0	1	2	3	4
I easily pick up on it when a person's mood shifts, even on the phone.		0	1	2	3	4
I can tell when someone isn't being genuine or honest.		0	1	2	3	4
Relationship Management		Never	Rarely	Sometimes	Often	Always
<i>My Relationship Management Score: _____</i>						
I love showing affection and appreciation.		0	1	2	3	4
I surround myself with people who enrich and support me.		0	1	2	3	4
I find it easy to share my deep feelings with loved ones.		0	1	2	3	4
Others tell me that I'm motivational and inspiring.		0	1	2	3	4
I am cheerful and enjoyable to be around.		0	1	2	3	4
Wherever I go, I am able to make new friends.		0	1	2	3	4
At social events, I contribute to the conversation and fun.		0	1	2	3	4
Helping people is a joy for me.		0	1	2	3	4
I am dependable and others know they can rely on me for anything.		0	1	2	3	4
People come to me when they are upset because they know that I can help them feel calmer and gain perspective.		0	1	2	3	4
Mark your EQ total scores to assess your strengths and areas for improvement						
Domain	My Scores - My EQ Strengths!					
Self-Awareness	0 2 4 6 8	10 12 14 16	18 20 22 24	26 28 30 32 34	36 38 40	
Self-Management	0 2 4 6 8	10 12 14 16	18 20 22 24	26 28 30 32 34	36 38 40	
Social Awareness	0 2 4 6 8	10 12 14 16	18 20 22 24	26 28 30 32 34	36 38 40	
Relationship Management	0 2 4 6 8	10 12 14 16	18 20 22 24	26 28 30 32 34	36 38 40	
Measure your effectiveness in each domain using the following key:						
0 – 24	Area for Enrichment: Requires attention and development					
25 – 34	Effective Functioning: Consider strengthening					
35 – 40	Enhanced Skills: Use as leverage to develop weaker areas					



Helpful Tips

Emotional Intelligence

Characteristics and behaviors that represent strong Emotional Intelligence.

Self-Awareness	Self-Management	Social Awareness	Relationship Management
<ul style="list-style-type: none"> • Know your relationship patterns • Know your story and how it affects you • Know your beliefs, your Emotions and your behavior 	<ul style="list-style-type: none"> • Maintain healthy eating and exercise • Learn skills for motivating yourself • Practice stress management and relaxation techniques 	<ul style="list-style-type: none"> • Develop and maintain a positive view of others • Understand non-verbal social signals • Understand basic human emotional needs 	<ul style="list-style-type: none"> • Learn how to support and affirm others • Develop skills for reflective listening and empathy • Develop conflict resolution skills

CARES | acronym for basic emotional intelligence skills

C ollaboration	The participant and me against the problem or issue.
A wareness	Be aware of my feelings and their effect on my attitude.
R egulation	Regulate the way I react to tough situations.
E mpathy	Show empathy for every customer.
S elf-Motivation	I am responsible for my attitude.



Tips for Building Emotional Intelligence

The following tips will help you to strengthen your emotional intelligence.

- Pay attention to how you and the participant respond and react to stress, other people, behaviors, body language, cultures and points of view. Consider keeping a journal on these observations or discuss what you notice with a coworker or supervisor. Approach this reflection with curiosity, rather than self-judgment.
- Try to identify what triggers these response/reactions.
- Actively consider on how you perceive others. Develop empathy by visualizing yourself in their shoes. Consider how different life experiences impact our different perspectives, triggers and biases. Consider how the participant's life experience has created their perspective. Remember that you don't know everything about this person's life, but that there are reasons they are what they are. This will help you respect their point of view.
- Take care of yourself in order to minimize your stress and avoid over-reacting, which will assist in managing and controlling your emotions.

REMEMBER

Emotional intelligence is **not about** being touchy/feely and it's not about being overly sensitive.

Emotional intelligence **is about** being aware of your emotions and the emotions of others, knowing the role emotions play in how you deal with others and how they deal with you, and managing these emotions so that you can build and maintain relationships.



Reflect and Plan – Emotional Intelligence and Relationships

Individual Reflection and Planning:

1. Look at your strongest EQ domain and write an example of how you demonstrate this strength in your daily work.

2. Look at your weakest EQ domain and write an example of how this growth area impacts your daily work.

3. For your weakest EQ domain, write specific steps you think could help you to improve in this area? This could include mental attitudes you want to cultivate, or specific actions you can take to help build this area. If you don't know how to improve, what resources do you have that you could utilize to help?

Peer-to-Peer Sharing and Planning:

4. Share your strongest EQ area with the group. Share specific thoughts, actions or practices you have that demonstrate this strength in your daily work. How does it help to build relationships with participants?

After learning from other people's strengths, write down best-practices you learned from the group in relationship building that you want to apply.

Intermediate Coaching Training

Lesson Two



SMART Goals: Warm-up Activity

Individual Work: *Look back at the powerful questions list on pages 11 and 12, or come up with your own questions. What powerful, open-ended questions can you ask participants to help ensure that their goals are SMART?*

1. Question that ensures goals are SPECIFIC:

2. Question that ensures goals are MEASURABLE:

3. Question that ensures goals are ATTAINABLE:

4. Question that ensures goals are RELEVANT:

5. Question that ensures goals are TIME-BOUND:

Peer-Peer-to-Peer Sharing:

6. Have a partner check your questions as you check your partner's questions. Help each other to make sure that questions are open-ended, encourage self-discovery and don't fall into any common coaching "traps" (advice, judgment). Edit your questions as needed.



Activities Involved in Scaffolding

Imagine a participant who needs to write a resume. They have a CV from another country, intermediate English language skills and they want a job. Imagine how you can use each of these activities to **unleash power** in this type of situation.

1. **Enhance interest in the task.** *Help participants understand why the task is important and how it leads to the accomplishment of their desired goal.*
2. **Break the task into smaller parts.** *Gain an understanding of what the person already knows. Make next steps hard enough so the person is challenged but easy enough so that the power can still lie with the participant.*
3. **Help the participant focus on the task or goal.** *Use powerful questions when participants are veering off track from their goals.*
4. **Help participant see the differences between his or her product and the desired product.** *This helps participants self-correct or self-learn.*
5. **Reduce risk/frustration in goal attainment.** *This includes “I do, we do, you do” activities, visual tools or technology aids.*
6. **Give feedback by summarizing progress and noting behaviors that contribute to success.** *This is critical to participants’ feeling encouraged, hopeful and capable. It encourages persistence.*
7. **Assist internalization, independence and generalization from other contexts.** *Recalling past visual tools or processes used means participants can complete tasks on their own the next time.*



Reflect and Plan - Scaffolding

Individual Reflection and Planning:

1. Where do you already use scaffolding in your work? What visual tools do you employ and when?

2. Of the seven scaffolding activities, which would you like to try using more often?

3. In what situations do you think scaffolding could be a tool that helps you unleash power in participants in a way that is supported, graduated way? For example: "When I teach someone how to use a bus pass."

Peer-to-Peer Sharing and Planning:

4. Share and discuss questions 1- 3 with a small group.
5. After sharing, write down TWO additional situations where you think you could use scaffolding with participants. What statements or phrases do you want to use? What visual tools could you employ?



Helpful Tips

When and how to **give advice, problem solve and step-in**

This checklist will help you determine if it is time to provide more direction:

- ☐ There are rules, regulations and information that you are required to provide as a part of your job description.
- ☐ The participant has specifically asked for information.
- ☐ Giving the advice is unlikely to create dependency.
- ☐ There are clear right/wrong answers to a legal, medical or financial issue that you are responsible for as a part of your job description.
- ☐ Without giving this piece of advice, the participant's physical, financial or mental wellbeing is truly in danger.
- ☐ The participant is not in a position to make their own decisions – for instance, they may be *temporarily* overwhelmed by the impact of some crisis or have severe mental illness.

But your motivation should **not** include any of the following:

- ☐ A wish to show your expertise.
- ☐ A wish to save time or future effort.
- ☐ Wanting to take control of the situation or be efficient.
- ☐ Feeling a need to pay the participant back for some slight
- ☐ A wish to not keep the participant from making mistakes.

Additional thoughts and useful tips:

- Ask the participant if it is okay to give them advice.
- Offer what you say as information, making it clear that the participant has to make up their own mind about how to use it.
- If you give your opinion, invite the participant to comment. For example, "These are the rules of the program. I'm wondering what your reaction is after to that?"
- Encourage the participant to get a second opinion.
- Remember that giving advice doesn't mean that the problem is fixed. It may make you feel more in control, but the participant is always the only one who can control their situation.
- You are responsible to the participant not for the participant.
- As a part of coaching, you should examine multiple options. At the end of the day, it is the participant's decision and their future at stake.



Case Studies: Appropriate Conditions for Giving Advice

Pick a case study topic that resonates with you. The trainers will help put you into groups based on the case study you want to discuss. As a group, discuss the following:

1. What coaching techniques/mindsets might be useful in this situation?
2. What additional information or resources that would you seek out before making a decision to give advice or problem solve?
3. Using the “Conditions for Giving Advice” tip sheet, what are the reasons why giving advice **would or would not** be a best practice in this situation?

Case Study 1: Housing: A participant comes to you stating that she has lost her housing. After using some active listening and powerful questions, it seems that domestic abuse may have been involved. She appears highly anxious and on edge about her children, who are with her. She tells you she is supposed to be at work right now and has not told anyone she couldn’t come in. She says she has nowhere to stay tonight, but has not yet explicitly asked for resources.

Case Study 2: Mental Illness: An extension participant is clearly depressed, and it has been affecting her ability to follow through on her goals. She goes through ups and downs but seems to be at a real low point. You know this participant’s story and have worked with her for a while. She is one of your all-time favorites. There is nothing that would make you more fulfilled than to see her happy and successful.

Case Study 3: Unrealistic Goal: You are meeting with one of your participants who has changed her goal three times within the past four months. She has decided that she wants to be a Physician’s Assistant. Her previous goals included being a hair dresser and day care provider. In order for her to work toward this goal, she will need to get a GED. With only 20 months left on MFIP, there won’t be enough time for her to obtain her GED before her benefits end. It seems very unrealistic to you.

Case Study 4: Immigrant with Legal Question: A participant of yours recently got hit by a car. He is a young man and a recent immigrant. He wasn’t hurt in the slightest. His friends and family are telling him he should sue, but you don’t think that hiring a lawyer is a good idea. You know he doesn’t have much money to spend, and you don’t think he will financially gain from a frivolous legal case with a sub-par

lawyer. Additionally this will distract from his community college classes. He flat out asks you for your advice, “If you were me, would you sue him?”

Case Study 5: Unrealistic Goal/Health Issue: You work with a participant who has a chronic, physical condition, which exempts him from having to meet work participation requirements. He is a proud man and feels emasculated being at home and not contributing to the household. His wife has a mandatory work requirement, and he doesn’t like that she works and he cannot. He has tried to work before, but he has always quit due to his medical condition. He is at your desk, telling you that his brother can get him a job at a shipping company. You know he is unable to lift the required weight in the job description. You worry you’ll fill out a lot of paperwork, rearrange child care, etc. only for him to quit his job again.

Case Study 6: Newly Arrived Refugee: You work with a Refugee who has just been resettled to St. Paul. He has never used public transportation or American currency, and he doesn’t speak or read English. He says he needs to go to a doctor’s appointment, but he doesn’t know where it is. He shows you a slip of paper with the address.

Case Study 7: Choose your Own: One person in the group will share a situation from their own caseload where they would struggle to determine whether Coaching is appropriate. This should be a situation where the Employment Counselor wasn’t sure whether or not to give advice.



Coaching and Mental Health

Things to consider when trying to determine if someone with mental health challenges is ready for coaching:

1. Is this person struggling with severe mental illness? If so, coaching is likely not for them at this time.
2. When you coach this participant does it turn into something that looks more like therapeutic counseling? If so, coaching is likely not right at this time.
3. Has the participant self-identified something they want to work on with you that is appropriate to your job description? If so, they may be ready for coaching.
4. Does the participant verbalize a desire to put changes into action? If so, they may be ready for coaching.
5. Is the participant able to take responsibility for moving forward? Are they open to new learning? If so, they may be ready for coaching.

Key points to remember when coaching those with mental illness:

- Of course, it is not our job to provide therapy for participants. Come into coaching sessions highly self-aware. Sometimes in our compassion and effort, we work outside of our areas of expertise because we think that no one else cares as much as we do or will make as much effort to help. Identify and be skeptical of this kind of thinking. We cannot save or fix participants and some things are better left to mental health professionals.
- The person is not the problem; the problem is the problem. Be informed on mental health and be an ally. "Accept the person's identity as separate from, and not enmeshed with, their illness or problem behavior, and support the person to make this important distinction. Someone who cannot achieve this separation is disempowered. They will believe that they are the problem, that something is wrong with them, and perhaps, therefore, that there is no solution." (Empowering People. Coaching for mental health recovery. By Rani Bora)



Coaching a Participant with a Known Mental Illness (Two Approaches)

1st Approach	
Coach:	Hi Mary, how are you today?
Mary:	Not good. I have been pretty stressed lately.
Coach:	I am sorry to hear that. Would you like to tell me a bit more?
Mary:	There are so many things happening all the time and it's totally stressing me out! My partner and I were together for five years. We broke up a few months ago and I'm having a hard time coping. I haven't been able to sleep, I have no energy, and there are some days that I don't even feel like getting out of bed. It doesn't help that I can't talk to my best friend about it, She's been in the hospital since last month. I am really worried about her.
Coach:	Mary, looks like you are going through a difficult time. Shall I make an appointment for you to meet up with your doctor?
Mary:	I am not sure what the doctor can do for me.
Coach:	Well, Mary I am worried that you may be getting depressed again. The doctor could review your medications
Mary:	I don't want any change in my medications.
Coach:	It will still be good to see your doctor, don't you think?
Mary:	...maybe
Coach:	Good, in that case I am going to call his secretary and arrange an appointment for you.

2nd Approach

Intro to Scenario

You have been working with Mary for 6 months. She has been diagnosed with stress-related mild depression and general anxiety disorder. She has come in today to do some goal planning.

Coach:	Hi Mary, how are you today?
Mary:	Not good. I have been pretty stressed lately.
Coach:	I am sorry to hear that. Would you like to tell me a bit more?
Mary:	There are so many things happening all the time. I just don't know what to do. <i>Mary goes on to describe different things that she was finding stressful. She broke up with her partner of five years a few months ago and is struggling to cope. She is not sleeping well and a close friend of hers has been unwell and in hospital. The coach asked a few more questions and thought that Mary was going through a mild depression.</i>
Coach:	Mary, if you could change the way you are feeling at the moment, how would you rather feel?
Mary:	I want to feel less stressed and overwhelmed.
Coach:	Could you re-phrase this in the positive? Language is very powerful, and I want you to describe how you would rather feel.
Mary:	Okay. I want to feel calmer and relaxed despite everything else that seems to be going on.
Coach:	Tell me what needs to happen in order for you to feel calmer?
Mary:	Life is pretty stressful at the moment. If I had a better grip on things, I would feel calmer.
Coach:	Of the three things you mentioned that are troubling you at the moment, which one do you think is the most important to get a grip on?
Mary:	I am concerned about my friend's health.

Coach:	What needs to happen in order for you to feel less concerned?
Mary:	I really don't know. She is doing all the right things, but the doctors haven't figured out what is wrong with her yet. I want to help her during this difficult time but don't know how to.
Coach:	It is difficult isn't it? How is she taking it?
Mary:	Oh she is worried, too, but doesn't want to admit it.
Coach:	What is within your control that you could do to support your friend?
Mary:	I guess I just need to be with her and give her time.
Coach:	And how might you go about doing this?
Mary:	I have been dreading to call her for some time. Maybe I can just give her a ring and arrange to meet up. But I don't know what to say?
Coach:	What is it that you think she wants to hear from you?
Mary:	I don't know really. Maybe I can just be there for her. Maybe I don't need to say much, just listen to whatever she needs to say.
Coach:	You started off by saying that you are concerned about her health. Would reaching out to her and connecting with her make you less concerned?
Mary:	Not really. However my avoiding contact has not worked either, and I'm more worried as I don't know how she is taking it.
Coach:	You said you were feeling overwhelmed already? What is it you need to do so that you can be there for your friend and at the same time not feel overwhelmed by her experiences?
Mary:	I need to look after my own health.
Coach:	Okay, and how would you do so?
Mary:	I used to like going out for long walks. When I am out and connecting with nature, I feel at peace.
Coach:	Good. Is this something you want to start doing again?

Mary:	I guess I should.
Coach:	Well you do have a choice – you can choose not to do it but feel stressed, or you could start doing it again and feel more at ease. What would you choose?
Mary:	I think my friend needs me and in order for me to be supportive, I need to do it.
Coach:	What else could you do?
Mary:	I haven't been to my yoga class for a while. I could do that too.
Coach:	That's great! Would it be useful for you to meet up with your doctor too?
Mary:	I don't think so – not at the moment, I think.
Coach:	Okay. But if you feel it could be helpful, you can of course always go to see your doctor. Let's come back to how we started off this conversation. You said you were feeling quite overwhelmed and stressed. How are you feeling at the moment?
Mary:	Funnily enough, talking to you has helped. I feel I have a few things I could do differently and feel slightly more in control. Thank you.
Coach:	That's good to know, Mary. I will meet up with you again in a week's time, and we can talk about how you have been getting on.
Mary:	Okay.
Coach:	Well, Mary - Thank you for coming in today and for sharing. I know that sometimes it's tough to open up and share, but I appreciate that you did.

Intermediate Coaching Training

Lesson Three



Goal Setting with the GAP Tool : Real Play

Instructions

1. Get into groups of three
2. Determine roles for first real play and then switch roles until everyone has been in each role.

Roles:

- **Coach:** Use the coaching techniques listed in the observer checklist below. Use these skills to coach the speaker as they set a goal using the GAP tool.
- **Speaker:** Will talk about something that you are hoping to change but have not been able to set into action yet. This should be a real goal, but not too personal for work. The conversation should last about five minutes
- **Observer:** Will observe the Coach and provide constructive feedback, using the observer checklist below.
 - * * * * *

Observer Checklist for: _____

- ☐ Used Reflective Listening Statements
- ☐ Used Summary Statements
- ☐ Used Open-ended Powerful Questions
- ☐ Avoided Traps (including closed-ended questions and advice)
- ☐ Mirrored speakers' body language and tone
- ☐ Showed genuine interest and engagement; developed rapport
- ☐ Respected the speaker's goals and autonomy
- ☐ Gave power back to the speaker as much as possible
- ☐ Goals were SMART
- ☐ Appropriate use of scaffolding:
 - Used powerful questions, statements and or tools to check assumptions about the speakers' current knowledge and understanding
 - Helped the speaker develop short term goals and/or tasks that were manageable but challenging

What coaching techniques did this person do especially well? What other coaching mindsets or skills did this person exhibit?

_____.

How could this person continue to grow their coaching skills?

_____.

RAMSEY COUNTY/WORKFORCE SOLUTIONS
GOAL ACTION PLAN

Participant's Name: _____ Case Number: _____ Date: _____

My Goal is: _____ **Due Date:** _____

Check the goal and action steps against SMART criteria (all must be checked):

☐ Specific ☐ Measureable ☐ Attainable ☐ Relevant ☐ Time-Limited

Instructions: Once you develop your goal, identify the action steps that you will need to achieve along the way. Your action steps should also meet the **SMART** criteria.

STRENGTH ASSOCIATED	ACTION STEPS TO ACHIEVE YOUR GOAL	TARGET DATE	DATE COMPLETED	SMART CRITERIA
	1.			<input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> A <input type="checkbox"/> R <input type="checkbox"/> T
	2.			<input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> A <input type="checkbox"/> R <input type="checkbox"/> T
	3.			<input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> A <input type="checkbox"/> R <input type="checkbox"/> T
	4.			<input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> A <input type="checkbox"/> R <input type="checkbox"/> T
	5.			<input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> A <input type="checkbox"/> R <input type="checkbox"/> T

Date of next appointment: _____ Was this goal obtained or discontinued?: ☐ YES ☐ NO If yes, date: _____

If no, what stopped you? _____



Correspondence Training

Correspondence Training is a strategy in which individuals make statements regarding their own behavior and are then provided with reinforcement when their statement and behavior **correspond**.

How to apply it	Example
In advance of the behavior, have the person make a verbal commitment to engaging in the behavior. Essentially, have them make a verbal SMART goal.	<i>"When are you planning on turning in your hours and how are you planning on getting here?"</i>
Praise after behavior was exhibited	Say <i>"Awesome job turning in your hours today! Thank you so much!"</i> Rather than, <i>"Awesome! I'll see you on Tuesday when you turn in your hours. Thanks so much!"</i>
Involve people in selecting the behaviors, either by providing a short list or by letting them choose anything.	<i>"So, I'm hearing you say that you'd like to work on being more organized. How would you like to work on that? We could either work on remembering your hours when they are due, or we could work on creating a system to keep your paperwork in your bag more organized. Which do you want to try?"</i>



Reflect and Plan – Correspondence Training

Peer-to-Peer Sharing and Planning:

Instructions: Work together in groups and answer the following questions.

1. What behaviors would you like to see participants exhibit more frequently?

2. How can you use correspondence training to help participants exhibit these positive behaviors more frequently?



Keys to Success for Enhancing Motivation and Encouraging Persistence in Goal Achievement

Keys to Success for Enhancing Motivation		
Type	What the Research Says:	How to Apply it:
Self-Talk	<p>“Self-talk” are statements made to self, mentally, written or out loud.</p> <p>Self-talk is associated with higher task engagement and performance outcomes.</p> <p>Additionally, it is associated with greater planning and self-monitoring.</p>	<p>Have participants say out loud, “I can do this.” Encourage them to write motivational quotes in places they will see them, for example, “Today will be better.” Encourage participants to discover their key “self-talk” phrases that resonate. Use powerful questions to have participants determine how they will remember to engage in this self-talk. Performance self-talk includes rehearsal and regulation strategies, like practicing interview questions in the mirror before going to the real thing.</p>
Make it fun!	<p>Individuals can improve task performance through interest-enhancing strategies.</p>	<p>Ask what could make the task more fun for the participant. Playing music while studying? Making friends on the job? Work together to create strategies that encourage persistence through hard times.</p>
Break it down	<p>Short term goals and self-set goals increase motivation, task completion and performance.</p>	<p>Use scaffolding and core coaching techniques so that participants create their own short-term, achievable goals. Every goal achieved will be an accomplishment they use to build confidence, motivation and persistence.</p>
Coping	<p>Motivation can be enhanced through emotional regulation techniques.</p>	<p>Explore coping strategies with participants to reduce negative thoughts and increase positive emotions.</p>
Praise	<p>Those who reward themselves for achievement are more productive than those who punish themselves for setbacks.</p>	<p>Encourage participants to reward themselves for achieving each step in the GAP tool. See next page for more detail.</p>



Helpful Tips

Simple Praise

Affirmation is powerful. Research indicates that it is more effective than punishments at encouraging people to reach their goals. If we believe the research to be true, that means that positive reinforcement can be more powerful than non-compliance and sanction!

Simple Praise					
Effective Praise is:	Example:	Why it works	Less-Effective Praise is:	Example:	Why it is less effective:
Private	Sara, nice work today.	She knows she is the one receiving the praise.	Public	Thanks Everyone.	No one knows if they, personally, are doing well.
Specific	You clearly practiced your interview skills and you've improved tremendously.	She knows exactly what she did right.	General	You all did an excellent job today.	They don't know what exactly they accomplished.
Non-Conditional	Well done.	That is that.	Conditional	Just make sure you do it again in the real interview.	They are left with a threat that takes away the power of the praise.



Helpful Tips

Advanced Affirmation

1. Give immediately after the display of positive behavior.
2. Provide information about the value of the accomplishment.
3. Acknowledge effort.
4. Help the participant to appreciate their own behavior.
5. Balance critical or corrective statement, with positive statements.
6. Praise improvement.
7. Above all, it must be genuine.



Reflect and Plan - Praise

Individual Reflection and Planning:

1. Think about a praise worthy accomplishment a participant recently achieved.
Write a private, specific and un-conditional affirmation:

2. Are there behaviors or accomplishments that you often praise? For example, do you often compliment participants on their timeliness or their appearance?

3. Are there behaviors or accomplishments that you would like to affirm and praise more frequently?

4. How will you remember to praise and affirm your participants more frequently?

5. What do you need to do to make sure your affirmation is genuine?



Activity

Summarizing “Reflect and Plans” : Coaching for Success

Domains	Strengths	Improvements
	<i>Describe Your Personal Strengths in each Dimension</i>	<i>What Would You Like To Change/Improve?</i>
Lesson One		
Active Listening		
Non-Verbal Communication		
Reflective Statements		
Summarizing		
Managing Distractions		
Powerful Questions		
Powerful Questions		
Emotional Intelligence		
Self-Awareness		
Self -Management		
Empathy		
Social Awareness		
Relationship Management		

Domains	Strengths	Improvements
Lesson Two		
Goal Setting		
Using SMART		
Scaffolding		
Determining when to give advice		
Lesson Three		
Use of GAP Tool as coaching tool		
Correspondence Training		
Praise/Affirmation		
Motivation and Persistence		
Case Notes		

See next page to help you put these reflections into action!

Action Plan

Create an action plan that will help you improve your coaching techniques. Include three specific things you will do in the next month to enhance your coaching skills and make the improvements identified above. Give each a deadline.

[illegible]



Glossary

Active Listening: The conscious effort of hearing not only the words that another person is saying but, trying to understand the complete message being sent.

Correspondence Training: A strategy in which individuals make statements regarding their own behavior and are then provided with reinforcement when their statement and behavior correspond.

Emotional Intelligence: Emotional Intelligence, or emotional quotient (EQ), is defined as an individual's ability to identify, evaluate, control, and express emotions.

Empathy: The ability to understand and share another person's experiences and emotions.

Goal Setting: A powerful process for thinking about your ideal future, and for motivating yourself to turn your vision of this future into reality.

Mirroring: Mirroring is when you adjust your own body language and spoken language so that you “reflect” that of the person you’re talking to.

Paraphrasing: Paraphrasing is repeating in your words what you interpreted someone else to be saying. Paraphrasing is powerful means to further the understanding of the other person and yourself.

Powerful Question: Powerful questions provoke thought, stimulate reflective thinking, challenge assumptions, generate energy, touch a deeper meaning, and evoke more questions.

Reflective Statement: Reflective statements closely repeat or paraphrase what the speaker has said in order to show comprehension. Reflection is a powerful skill that can reinforce the message of the speaker and demonstrate understanding.

Relationship Management: The ability to use the awareness of your own emotions together with your understanding of the emotions of other to manage interactions.

Self-Awareness: The ability to understand your emotions as well as recognize their impact on others.

Self-Management: Controlling your emotions and using your awareness of them to stay flexible and remain positive.

Social Awareness: The ability to identify the emotions of others, understand their perspective, and take an interest and concern.

Summarizing: Restating a condensed version of what was said without changing the meaning or omitting the main points.



Helpful Tips

Resources

7 Steps to Emotional Intelligence by Patrick E. Merlevede

Coaching for Emotional Intelligence: The Secret to Developing the Star Potential in Your Employees by Bob Wall

Coaching Skills: A Handbook. 2012. New York, NY. By Jeni Rodgers

Coaching Students with Executive Skills Deficits. 2012. New York, NY. By Peg Dawson and Richard Guare

Cultural Intelligence: Individual Interactions across Cultures by P. Christopher Earley and Soon Ang

The Emotionally Intelligent Manager: How to Develop and Use the Four Key Emotional Skills of Leadership by David R. Caruso

Empowering People: Coaching for Mental Health Recovery by Rani Bora

The EQ Difference: A Powerful Plan for Putting Emotional Intelligence to Work by Adele B. Lynn

Manager's Pocket Guide to Emotional Intelligence by Emily A. Sterrett, Ph.D.

Mastering Mentoring and Coaching with Emotional Intelligence by Patrick E. Merlevede and Denis C. Bridoux

Online Resources

- International Coach Federation Research Portal:
<http://www.coachfederation.org/icf-research/icf-research-portal/>
- Marshall Goldsmith Library: <http://www.marshallgoldsmithlibrary.com/>
- The Coaches Training Institute: <http://www.thecoaches.com/>
- Jim Merhaut. <http://www.coachingtoconnect.com/life-coaching.html>

My Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



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