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|  COACH: | DATE: |
| COACHEE: | OBSERVER: |



**Competency Observer Guide**

**As Observers***:*

* ***The Opportunity:*** Is to learn and reflect how to enhance your personal coaching approach.
* ***Our Focus*:** Focus on how the coach utilizes the coaching competencies and elements of the 5/5/5 Model.
* ***Our Response:***Provide evidence of behaviour that supports our observation. How you heard/saw the competency/element be displayed (or not displayed).
* ***Our Gift:*** Is to remind the coach what they did well, so they may repeat it in the future.
* ***Our Way:*** How you would have coached, what you would have said or approached this exchange is good insight for you. **Not relevant to this coach as feedback.**
* ***Our Delivery:*** It is important the feedback is **delivered in a way that supports the coach's growth and development** by building upon the strengths of their existing skills.

**Competency Observer Guide**

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| **Observed Coaching Exchange Elements*** Identify - What the Client wants to accomplish and address.
* Discover – Explore the options, beliefs, perspectives, and learnings.
* Strategize -Action plan to bridge gap from today to future goal.
* Clear The Way - Address obstacles to the action plan.
* Recap - Cement clarity for forward action.
 | **Core Coaching Skills** * Listening
* Encouraging
* Questioning
* Requesting
* Action Planning
 | **Observed Guiding Principles** * Be Curious
* Be Supportive
* Be Accepting
* Be Focused
* Be Committed
 |
| Observed Core Competencies – Check those that apply | Definition / **How Observed** |
| **3. Establishes and Maintains Agreements*** Partners with the client to identify or reconfirm what they want to accomplish in the session.
* Partners with the client to define what the client believes they need to address or resolve to achieve what they want to accomplish in the session.
* Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching engagement or individual session.
* Partners with the client to manage the time and focus of the session.
* Continues coaching in the direction of the client's desired outcome unless the client indicates otherwise.
* Partners with the client and relevant stakeholders to establish an overall coaching plan and goals.
* Partners with the client to determine client-coach compatibility.
* Explains what coaching is and is not and describes the process to the client and relevant stakeholders.
* Reaches agreement about what is and is not appropriate in the relationship, what is and is not being offered, and the responsibilities of the client and relevant stakeholders.
* Reaches agreement about the guidelines and specific parameters of the coaching relationship such as logistics, fees, scheduling, duration, termination, confidentiality and inclusion of others.
* Partners with the client to end the coaching relationship in a way that honors the experience.
 | Definition: Partners with the client and relevant stakeholders to create clear agreements about the coaching relationship, process, plans and goals. Establishes agreements for the overall coaching engagement as well as those for each coaching session. |
| **6. Listens Actively*** Reflects or summarizes what the client communicated to ensure clarity and understanding.
* Recognizes and inquires when there is more to what the client is communicating.
* Notices, acknowledges and explores the client's emotions, energy shifts, non-verbal cues or other behaviors.
* Integrates the client's words, tone of voice and body language to determine the full meaning of what is being communicated.
* Notices trends in the client's behaviors and emotions across sessions to discern themes and patterns.
* Considers the client’s context, identity, environment, experiences, values and beliefs to enhance understanding of what the client is communicating.
 | Definition: Focuses on what the client is and is not saying to fully understand what is being communicated in the context of the client systems and to support client self-expression. |
| **7. Evokes Awareness*** Asks questions about the client, such as their way of thinking, values, needs, wants and beliefs.
* Asks questions that help the client explore beyond current thinking.
* Invites the client to share more about their experience in the moment.
* Notices what is working to enhance client progress.
* Adjusts the coaching approach in response to the client's needs.
* Challenges the client as a way to evoke awareness or insight.
* Helps the client identify factors that influence current and future patterns of behavior, thinking or emotion.
* Invites the client to generate ideas about how they can move forward and what they are willing or able to do.
* Supports the client in reframing perspectives.
* Shares observations, insights and feelings, without attachment, that have the potential to create new learning for the client.
* Considers client experience when deciding what might be most useful.
 | Definition: Facilitates client insight and learning by using tools and techniques such as powerful questioning, silence, metaphor or analogy |
| **4. Cultivate Trust and Safety*** Seeks to understand the client within their context which may include their identity, environment, experiences, values and beliefs.
* Demonstrates respect for the client’s identity, perceptions, style and language and adapts one's coaching to the client.
* Acknowledges and respects the client's unique talents, insights and work in the coaching process.
* Shows support, empathy and concern for the client.
* Acknowledges and supports the client’s expression of feelings, perceptions, concerns, beliefs and suggestions.
* Demonstrates openness and transparency as a way to display vulnerability and build trust with the client.
 | Definition: Partners with the client to create a safe, supportive environment that allows the client to share freely. Maintains a relationship of mutual respect and trust. |
| **5. Maintains Presence*** Remains focused, observant, empathetic and responsive to the client.
* Demonstrates curiosity during the coaching process.
* Manages one's emotions to stay present with the client.
* Demonstrates confidence in working with strong client emotions during the coaching process.
* Is comfortable working in a space of not knowing.
* Creates or allows space for silence, pause or reflection.

  | Definition: Is fully conscious and present with the client, employing a style that is open, flexible, grounded and confident. |
| **8. Facilitates Client Growth*** Works with the client to integrate new awareness, insight or learning into their worldview and behaviors.
* Partners with the client to design goals, actions and accountability measures that integrate and expand new learning.
* Acknowledges and supports client autonomy in the design of goals, actions and methods of accountability.
* Supports the client in identifying potential results or learning from identified action steps.
* Invites the client to consider how to move forward, including resources, support and potential barriers.
* Partners with the client to summarize learning and insight within or between sessions.
* Celebrates the client's progress and successes.
* Partners with the client to close the session.
 | Definition: Partners with the client to transform learning and insight into action. Promotes client autonomy in the coaching process. |
| *Overall Coaching Approach* |  |
| **2. Embodies a Coaching Mindset*** Acknowledges that clients are responsible for their own choices.
* Uses awareness of self and one's intuition to benefit clients.
* Develops and maintains the ability to regulate one's emotions.
* Engages in ongoing learning and development as a coach.
* Develops an ongoing reflective practice to enhance one's coaching.
* Remains aware of and open to the influence of context and culture on self and others.
* Mentally and emotionally prepares for sessions.
* Seeks help from outside sources when necessary.
 | ***Definition: Develops and maintains a mindset that is open, curious, flexible and client-centered****.* |
| **1. Demonstrates Ethical Practice*** Uses language appropriate and respectful to clients, sponsors and relevant stakeholders.
* Is sensitive to clients' identity, environment, experiences, values and beliefs.
* Demonstrates personal integrity and honesty in interactions with clients, sponsors and relevant stakeholders.
* Refers clients to other support professionals, as appropriate.
* Abides by the ICF Code of Ethics and upholds the Core Values.
* Maintains confidentiality with client information per stakeholder agreements and pertinent laws.
* Maintains the distinctions between coaching, consulting, psychotherapy and other support professions.
 | *Definition: Understands and consistently applies coaching ethics and standards of coaching.* |

**Observer Insight**

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| COACH: | DATE: |
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What I observed that worked well in the Coaching Exchange.

What I learned by observing this coaching exchange.

**My Coaching Action Plan**

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| The way(s) I will integrate and/or incorporate this learning into my coaching style and approach. |
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| What will be the impact of doing this? | How might your client respond as a result? | What might get in the way of starting this? |
|  |  |  |
| Who or what will help with this action plan? | How committed are you to this action plan? | What else? |
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