


COACHING IN NURSING:

AN INTRODUCTION





Great coaches and mentors are so unshakably convinced that we have great things in us — their vision of what is possible for us is so clear and powerful — that they wind up convincing us too.

Lou Tice

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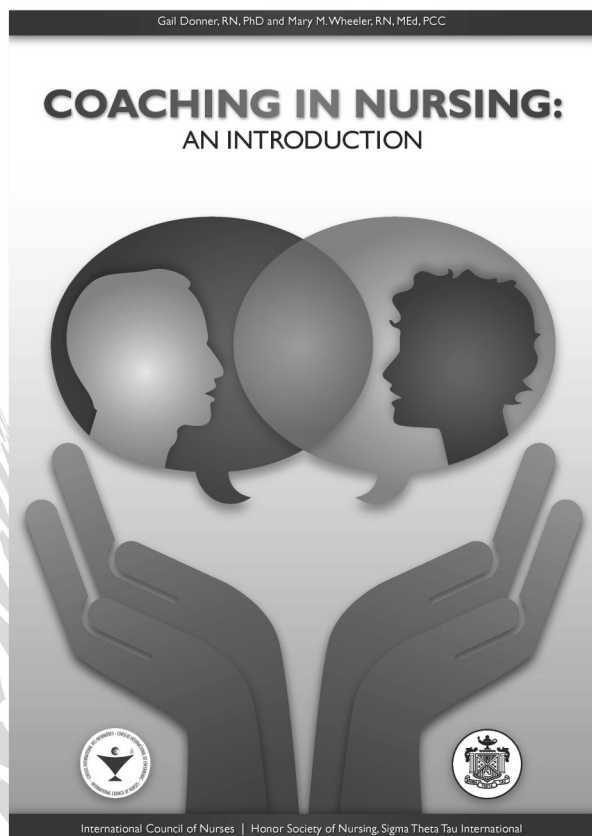
Earn six hours of continuing education after you complete this workbook!

Visit www.nursingsociety.org/CoachingWorkbook to get started today.

Did you know that you can earn six (6) free hours of continuing education just by taking an online test after you read this workbook?

It's easy! Just follow these simple steps to earn your free CE:

1. Visit the honor society Web site at www.nursingsociety.org.
2. Click the education tab, and then click "Free CE for all nurses."
3. Under "Coaching in Nursing," click the link to take the online test.
4. Follow the instructions.



The Coaching in Nursing Workbook is a free resource from the Honor Society of Nursing, Sigma Theta Tau International and the International Council of Nurses.

This tool is a hands-on guide that can be used to teach nurses coaching principles and skills in order to develop individual professional competencies and to improve nurse staffing retention.



Sigma Theta Tau International
Honor Society of Nursing®

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About the Authors

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They have done work in Canada, the United States, Europe and South Africa and have worked with the International Council of Nurses (ICN) and the Honor Society of Nursing, Sigma Theta Tau International, including “It’s Your Career: Take Charge,” and “A Guide to Coaching and Mentoring in Nursing,” for ICN and the “Achieving Your Lifelong Career” workshops for the honor society. Gail is past president of the Lambda Pi Chapter of the honor society and Mary is currently an honor society book proposal reviewer.

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Greetings

From the International Council of Nurses and the
Honor Society of Nursing, Sigma Theta Tau International

Congratulations! By using this *Coaching in Nursing Workbook*, you have taken another step toward enriching your nursing experience and broadening your career. This workbook will help you improve your skills and incorporate coaching principles in to your practice — whether you are a clinician, administrator, educator or researcher. Coaching is a tool that if implemented strategically can affirm and develop professional competencies such as critical thinking, communication and delivering improved patient-centered care. It also can foster scholarship in the clinical setting, provide a method of communicating practice knowledge and help novices integrate the use of theory in their practice.

This workbook, a joint effort between the International Council of Nurses (ICN), International Centre for Human Resources in Nursing (ICHRN) and the Honor Society of Nursing, Sigma Theta Tau International, is a hands-on guide filled with exercises, checklists and conversation starters. It uses role-playing as a learning tool for independent/individual study, and supports the coaching principles and strategies in the International Council of Nurses monograph, *A Guide to Coaching and Mentoring in Nursing*.

The International Council of Nurses is a federation of more than 130 national nurses associations representing the millions of nurses worldwide. Operated by nurses and leading nursing internationally, the International Council of Nurses works to ensure quality nursing care for all and sound health policies globally. The ICHRN is a unique online resource dedicated to strengthening the nursing workforce globally through the development, ongoing monitoring and dissemination of comprehensive information and tools on nursing human resources policy, management, research and practice (www.ichrn.org).

The honor society, a membership organisation representing more than 130,000 nurses worldwide, supports the learning and professional development of nurses in order to improve the health of the world's people. The honor society believes that coaching and mentoring positively influences the personal and professional lives of nurses.

This practical and relevant nursing resource is available to nurses like you around the world. As you pursue your career goals and consider your coaching journey, this workbook is an outstanding tool to have at your fingertips. It exists to facilitate collaboration and communication, to encourage professional development and to improve retention and career satisfaction. Drs. Donner and Wheeler are internationally recognized for their efforts in coaching and mentoring and for their innovation and collaboration, especially in the area of nurse career planning and development.

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How to Use This Workbook

Coaching is an interactive, interpersonal process that supports continuing personal, professional and career development through the acquisition of appropriate skills, actions and abilities that are crucial to professional practice. It offers many benefits to both coaches and those being coached (usually referred to as clients), including improved confidence and autonomy in one's role, improved job satisfaction and productivity, and the development of new knowledge and skills.

Whether you are a practitioner interested in improving your practice, a leader investigating new systems and programmes or a nurse who would like to become or find a coach, this workbook will help you learn:

1. The purpose and scope of coaching
2. When you might need a coach and how to find one
3. Fundamental coaching principles and how to apply them
4. How coaches are prepared and how organisations can use coaching programmes

This workbook will help you learn the skills required to be a coach and help you integrate coaching skills into your practice. This is an introduction to basic coaching principles and processes, and we hope it will prompt you to consider more training as a coach. To be a professional coach requires more concentrated study, practice and supervision and is usually accomplished through a formal and accredited coach training programme. Refer to the International Coach Federation (ICF) www.coachfederation.org for more information.

This workbook has been developed to help you learn and to engage you in a process for learning. You can use it on your own to develop your own skills, or you can use it as a resource to help you plan a coaching programme in your organisation. The best way to use it is the way that helps you accomplish your goals.

This workbook includes narrative and discussion as well as selected learning exercises and is organised into five sections. Part One, About Coaching, provides you with information about coaching in general, including what coaching is, why it is an important and useful strategy, how coaching and mentoring differ, current trends in coaching, and how to be and/or find a coach. Understanding the principles and processes of coaching and feeling comfortable with the content provides a solid foundation when you begin to practice the skills themselves. Part Two, The Coaching Conversation, provides you with a step-by-step description of the components of a successful coaching conversation along with some questions for you to consider and answer. In Part Three, Practice Coaching Exercise, you have the opportunity to do some work designed to help you implement what you have learned, i.e. to practice doing some coaching with support and guidance from the workbook. Part Four, Programmes to Prepare and Use Coaches, provides an overview of how coaches are prepared and how organisations can use coaching programmes to support nursing and nursing practice. A summary of what the workbook has provided is in Part Five. The workbook concludes with a list of references and resources to assist you in your learning. Once you have completed the workbook, take a test on-line and earn six continuing education credits (see page 4).

Learning about coaching is not something that can happen in an hour or an afternoon; it requires you to read, think, reflect and practice. Being a successful coach and participating in a successful coaching relationship is something that will always be a work in progress.

PART ONE:

ABOUT COACHING

Most people don't need advice. They just need support and discipline in doing what they already know works.

Marianne Williamson

What is Coaching?

Coaching is a collaborative relationship undertaken between a coach and a willing individual, the client. It is time-limited and focused and uses conversations to help clients achieve their goals. It demands skill on the part of the coach in facilitating meaningful conversations and letting the client “lead.” Learning starts when the coaching conversation begins and new actions and new practices are always the final stage of a successful coaching conversation.

Coaching is not giving advice, not teaching, and not directing — it is a collaboration in which the coach acts like a midwife: supporting, encouraging and helping the client through the experience while acknowledging the client as the expert and the person “making it happen” (Donner & Wheeler 2005). To facilitate these coaching conversations, a coach must have the ability to listen, discuss and question; to clarify core values, beliefs and sense of purpose; to identify gaps between a client’s vision and reality; and to encourage, motivate and instill confidence.

Coaching is a key competency for leaders, managers, educators, researchers and practitioners. Coaching helps nurses engage in conversations and relationships that are directed at enhancing professional development, career commitment and practice. Individuals act as coaches or are coached to advance their career opportunities and practice. They may also use coaching to help them increase enjoyment of and satisfaction with their current roles.

Sometimes the terms coaching and mentoring are used interchangeably, but coaching is

not the same as mentoring. Both are independent but related by the communication strategies that are often used to promote professional development and facilitate retention. Understanding their differences will help individuals and organisations ensure that they choose the right strategy for the right purpose. Thus, although coaching and mentoring are aligned, they are independent concepts and strategies. What unites them is that both are founded upon mutual trust, respect and excellent communication skills. While they are not interchangeable, a nurse may have or be both a coach and a mentor, or an organisation may employ both strategies.

To help you better differentiate between the two terms, remember:

- *Coaching* is a collaborative relationship, undertaken between a skilled facilitator (coach) and a willing individual (client). It is time limited and focused and uses conversation to help clients (individuals or groups) achieve their goals.
- *Mentoring* is a longer term relationship in which someone with more experience and wisdom (mentor) supports and encourages another (mentee/protégé) as that individual grows and develops professionally and personally. While you may use coaching skills as a mentor, you do not need to be a mentor to be a coach.

Trends in Coaching

There are some trends, both in method and application, that are emerging in coaching that have possibilities for nurses and nursing. Individual, group and team coaching are relatively new to nursing. To capitalize on this potential, we need a variety of methods and designs for programmes that prepare coaches, along with rigorous evaluation processes.

Coaching, whether provided in person, by phone or over the Internet, has traditionally been seen as a one-on-one activity. Group

coaching is a newer method that is gaining momentum. It brings individuals together in a group to present their individual issues and work together with a facilitator, the coach, to develop individual plans to resolve those issues. For example, new nurse recruits may meet as a group with a coach and discuss their individual challenges in navigating and adapting to their new workplace. In team coaching, the team, rather than the individual, is the client. The issue to be discussed and resolved is the team's issue, not the individual's. The same process applies as with a group; however, the team develops the plan.

In addition to trends in methods of coaching, there are also untapped opportunities with regard to different application areas for coaching. Four areas for future development in nursing are peer, health and interprofessional coaching and succession planning. Let's take a closer look at each.

• *Peer Coaching*

Peer coaching can be used to help nurses advance their careers and increase their job satisfaction. Organisations continue to look for ways to retain senior nurses and provide opportunities for junior nurses and to offer practical help and support to all nurses. Providing opportunities for a nurse coach to assist a colleague working on a clinical or professional issue is one way an employer can recognize the expertise and commitment of that nurse and provide support to other nurses. Peer coaching can also be used to enable staff to have conversations about their careers and career possibilities. These kinds of conversations help contribute to a work environment that is career-sensitive and supports the career aspirations of employees.

New recruits or beginning practitioners are valuable yet vulnerable resources within the organisation and as such require special attention. Peer coaching can enhance retention by providing new employees with the skills and savvy they need to navigate through the organisation and negotiate successfully with their colleagues. Peer coaching can be delivered in an individual or group format to support these new recruits.

• *Health Coaching*

Health coaching can be a useful strategy for nurses who want to help patients achieve their goals. Patients increasingly want to take charge of their own health and their own health futures, and health coaching enables nurses to use a focused form of communication in delivering patient-centred care. Presently, there are very limited examples of health coaching in the literature. However, the approach seems a natural fit for the nurse-client relationship where the clients articulate their needs and the nurse-coach asks questions that will help move the client forward. Coaching clients and patients is another application that holds promise for expanding nursing practice.

• *Interprofessional Coaching*

There is an increasing emphasis on advancing interprofessional education and practice. The ultimate goal is to have nurses, physicians and other health care professionals working together in teams to provide comprehensive care. Working together effectively requires more than knowledge about teams and team work; it requires readiness for an interprofessional team to be created and sustained. A coach can facilitate the development of the team as members work on their relationships and also provide a forum for their ongoing reflection and action. Because nurses recognize the benefits of cooperation, they can take a leadership role in mobilizing the interprofessional team and ensuring the team achieves its objectives.

• *Succession Planning*

Finally, coaching can be used to support succession planning programmes. Demographics, changing definitions of work-life balance, and the impending retirement of significant numbers of leaders over the next five years are major challenges for nursing around the globe. Leadership succession planning programmes are becoming a key component of many organisations' long-term human resources strategies. Individual and group coaching, mentorship and internship/job sharing are generally built into these programmes.

Coaching is used to ascertain individual career aspirations, clarify learning and personal development goals, and support new leaders in transition.

The Client

The only attributes required to be a client, i.e. engaging in a coaching relationship, is a willingness to question who you are and what you are doing and an openness to exploring possibilities for your future that almost always mean change. In a coaching relationship, it is the client who asks the coach to show possibilities the client cannot see, that are beyond the horizon of possibilities of who the client is right now, and it is the client who chooses the focus of the coaching conversation.

Client requests may be for, but are not limited to, assistance with such issues as performance, career or lifestyle. Clients need to come willingly to the coaching conversation, and their self-identified need for change is the catalyst for moving forward. As in any change process, the client has to identify his or her intentions before behaviour modification will occur.

When Might You Need a Coach?

There are times in our professional lives when we are not sure what our next step should be. That's when we can benefit from a coaching conversation. We know what we want to accomplish, but our self-limiting perceptions get in the way of realizing our personal vision. These inner voices plant the seeds of self-doubt and fear, and whisper "you can't do that" or "what if." It takes courage to say, "I don't know what to do next," but once you acknowledge it, the possibilities for moving forward are limitless.

Most of us know what we want to do and be — all we need is a safe place and support to achieve our goals. Knowing when to seek the services of a coach is as important as knowing how to select one. A coach can help you face your fears, stretch your capacity and move forward.

The following are a list of situations for which the services of a coach might be helpful. Can

you see yourself in one of these situations? Check the one(s) that apply to your present state.

- Are you at the very beginning of your career and need help in navigating the work environment, clarifying your priorities and learning how to adapt to new situations?

- Are you a mid-career nurse looking for work-life balance who needs help deciding whether to take on new responsibilities and/or shed old ones?

- Are you a late-career nurse beginning to consider how to reduce your workload so it is more manageable, or are you contemplating how to prepare for retirement?

- Are you experiencing career/life stress, i.e. you have a number of competing interests/demands/priorities and need help sorting them out in order to move forward?

- Are you thinking about your career in an organised and systematic way but feel stuck, uncertain of your next steps and/or have some career questions that need exploring?

- Are you a nurse leader who requires support in developing and achieving your role-specific professional goals?

If you answered "yes" to any one of these situations, consider using the services of a coach.

Articulating Your Needs

Having a clear purpose is critical to all phases of the coaching relationship and also guides in the evaluation of the coaching relationship on an ongoing basis. Your purpose needs to be accompanied by a strong determination to produce a desired result. Your determination is what will help ensure your success in achieving your goals.

Two questions that will help you develop a clearly articulated purpose for engaging a coach are:

1. What do I need/want? For example, “I need help with making a career move.”
2. What is it that has made me decide that using a coach can help me with what I need/want? For example, “I need to discover what is getting in the way of me moving forward and accomplishing my career goals and why I can’t do this by myself.”

Finding a Coach

Now that you have a purpose for a coaching conversation, you will need to find a coach. Since coaching is a relationship built on mutual trust, the coach must be someone whose expertise and method you value and trust. Some health care organisations include coaching services as part of their human resources offerings. Professional organisations may have coaches available for members, and some community organisations have coaches. Of course, many self-employed coaches also provide coaching on a fee for service basis and also may be on a centralized roster, such as with the International Coach Federation (ICF) as part of their Coach Referral Service.

Just as in any other relationships, the fit between you and the coach is critical. So, use your network, get some referrals, and then search out a few potential coaches and learn as much as you can about them before you make a decision. Be an informed consumer. Here are some questions to consider asking a potential coach:

1. What are your qualifications, experience and expertise?
2. Do you use a formal coaching agreement with your clients? May I see a sample?
3. Do you incorporate a feedback and evaluation process into your practice?
4. Can you provide references?
5. What are your fees?

As with any purchased service, you need to know the fee range and what you are willing to pay. Remember to inquire about the services of your professional association or a nonprofit agency such as the YMCA/YWCA;

they may provide a similar service and at a lower cost. Many coaches will provide a short complimentary conversation (usually about 20–30 minutes) to assist both you and the coach to determine whether the “fit” is there, i.e. whether the two of you have the potential for a successful relationship. Once you begin the coaching relationship, the length of the conversations, the number of times you need to meet or talk and the outcomes are the product of your collaboration with the coach and often form part of a written or verbal coaching agreement (see Part Two).

Dealing With Difficult Coaching Situations

Coaching is something you ask for to help you develop and implement your vision and goals. But once you begin the coaching relationship, situations may arise that make you wonder if this is the right coach for you.

Example: You and your coach have had three coaching conversations. You are getting the feeling that the coach is someone who likes to move things along at a pace that is faster than your way of approaching problems and situations, which tends to be slower and more methodical. You also acknowledge when this has occurred in other relationships, you have tended not to say anything and felt frustrated later. So what will you do?

1. You should discuss the situation with the coach and explore the options for improving the relationship. Ideally, you and the coach established a coaching agreement that included a conversation about how you both would handle the situation if the “fit” between the two of you was no longer there. Now is the time to refer back to that agreement.

2. If you did not have that discussion when you began the relationship, then you will need to initiate it when you first feel uncomfortable. You could begin the discussion by saying: “I want to talk to you about how I am feeling. I am concerned that you are expecting me to move toward my goals more quickly than I am comfortable. Can we talk about this and find a way to go forward?”

3. If you didn’t have an agreement and you feel the coach is not sensitive to your con-

cerns even after having a discussion, you should consider ending the relationship and seeking another coach. You can broach the subject by saying: “I’ve been doing a lot of thinking about our coaching relationship and the difference in our styles and I realize I am not comfortable with the progress I am making. I would like to end our relationship and move forward in another direction.” Remember, you are in charge of your own experience.

The Coach

There are different stages in our careers when we look for enrichment opportunities. For many nurses, informal coaching roles form part of their day-to-day activities, whether talking with colleagues about their career visions or with clients about their visions for their health. Having a coaching conversation with either a colleague or client is an opportunity to listen to what may be stopping them from realizing their visions. If coaching is of interest to you, consider participating in a coach training programme that will not only increase your skills but also broaden your own career possibilities. You may also want to consider the long-term value of participating in an accredited coaching programme that would provide you with a recognized credential (see Part Four). What is important is that, if you become a coach, you should be as well prepared as possible.

Now that you understand the fundamentals of coaching and how it can be used, it is time for you to learn more about the coaching relationship itself, i.e. the “how to” of coaching.

Exercise – “About Coaching”

Before moving on to Part Two, take a few moments to review and complete these written exercises:

1. Coaching and mentoring are not the same thing. How are they different? _____

2. What are four coaching opportunities for future development in health care? _____

3. How do I determine when I might need a coach? _____

4. I would find a coach by: _____

5. One strategy to dealing with a difficult coaching situation would be: _____

6. Describe how being a coach can be an enriching career opportunity. _____

Check your answers with those in the back of this workbook. How did you do? Do you need to go back and reread Part One?

Are you are ready to move on to Part Two, The Coaching Conversation?

PART TWO:

THE COACHING CONVERSATION

I believe we can change the world if we start listening to one another again. Simple, honest, human conversation where we each have a chance to speak, we each feel heard, and we each listen well.

Margaret Wheatley

A coaching conversation takes place within a coaching relationship. A relationship is typically described as the bond or connection one has with another. In this co-created relationship, both the coach and the client assume responsibility for the process. The conversation is founded on mutual trust, honesty and respect, one that is open and flexible and one in which confidentiality is honoured. Fundamental to this relationship is the coach's acknowledgment that the client:

- makes a request to the coach to engage in a conversation of learning, possibilities and action;
- gives the coach permission to engage in an interaction with her or him; and
- benefits from and is responsible for the results that they intend to produce.

Two steps are critical to setting the foundation of the coaching relationship: the client having a clear purpose for initiating the coaching relationship (see Part One) and the coach and the client establishing an agreement to work together. Both of these steps will ensure the success of the coaching relationship.

The Coaching Agreement

The coaching agreement is customized and clarifies the specifics of the relationship, the process, the scope and the responsibilities. It is important that both the coach and the client are clear about their mutual expectations. The coaching agreement should include a shared understanding of the commitment both the coach and the client are making to the coaching relationship and what each will do to ensure that the relationship works

for both. Confirming this agreement at the outset creates a foundation that is positive and that minimizes the potential for future conflict and misunderstanding to arise.

The following are important questions the coach and the client should consider individually and discuss together before formalizing their coaching relationship:

- What factors are key for working together?
- How often will we meet?
- How long will the session be?
- What happens in the event of missed appointments?
- What would be indicators that there may be problems with the coaching relationship?
- What actions will I take and within what time frame will I take them if I am not satisfied with the coaching relationship?
- If I cannot resolve differences or I discover that we are not a good match to achieve mutual goals, what will I do?

Figure 1, presented on the next page, is a sample coaching agreement. In this sample, the coach is an independent entrepreneur and is charging a fee for his or her services. It is important that you develop your own customized agreement that includes the components that reflect the type of coaching relationship you wish to have with your client.

Quality Conversations

Now that you, the coach, and your client have established the purpose for your coaching relationship, and have a signed coaching agreement, you are both ready to engage in a coaching conversation. Quality conversations embody four components:

1. Climate Building
2. Clarifying
3. Collaborating
4. Closing

focus on what really counts in their lives and work commitments, to take risks and be courageous. To create an informal atmosphere conducive to the coaching conversation, here are some tips for the coach:

Let's take an in-depth look at these guidelines.

Climate Building establishes a relaxed, informal, welcoming and supportive environment conducive to dialogue and learning. A supportive environment enables clients to

- Find a space that assures privacy and prevents interruptions and distractions.
- Allow yourself time before the client arrives so that you are not rushed and that you are prepared for the conversation.
- Turn off your computer and any electronic

Figure 1 — Sample Coaching Agreement

The following describes my coaching service and clarifies the terms of my relationship with my clients. I abide by the International Coach Federation (ICF) philosophy and definition of coaching. ICF defines professional coaching as "an ongoing partnership that helps clients produce fulfilling results in their personal and professional lives."

In each session, you, the client choose the focus of conversation while I listen and contribute observations and questions and eventually evoke from you a vision and a plan for taking action. My services are offered by phone, face-to-face or by e-mail.

I offer an initial consultation, at no charge, to assess whether there is a fit between a potential client's needs and my services. Once you contract with me, you are responsible for the fees, for making and keeping appointments, for initiating the phone calls for the coaching sessions, and for giving adequate notice if an appointment must be cancelled. If the time is not used within 6 months, and if you do not discuss an alternate arrangement, then the hours are forfeited.

Throughout the relationship, I promise that all information provided by you will be kept strictly confidential. I am not responsible in any way for the results that you intend to produce. You, the client, promise that you will be prepared for each session and will come to each session willing to engage in a conversation about possibilities and action. You understand that the coaching relationship can only be granted by you, the client. If at any time you believe that the relationship is not working, you will take action and communicate your concerns to me, the coach, preferably verbally.

My fees are _____, which include an initial 1.5 hour assessment/goal setting session and 6 hours of coaching over 6 months. These hours can be used in half-hour or 1-hour increments of time. The total fee is due before the first coaching appointment begins. If alternate payment methods are necessary, they should be discussed prior to the first session.

You, the client, are responsible for contacting me to make an initial phone or face-to-face appointment. You are also responsible for calling or meeting with me at the scheduled time. At the end of each scheduled appointment, you and I will set up the next session. I will follow-up by e-mail to confirm the next agreed-upon steps.

I require 48 hours notice to cancel or reschedule an appointment. I will make every attempt to find another suitable time for the client. If you do not give notice, you will forfeit 1 hour from your total allotted time in each 6-month period.

_____	_____	_____	_____
Client	Date	Coach	Date

devices, mute or forward your telephone and do not answer it.

- Arrange the seating so that you are facing each other and that you are not behind a desk.

Clarifying occurs when the purpose of the coaching conversation is articulated and goals are identified. You need clarity as to why your client wants coaching, what issue(s) your client wants to focus on and what will be some indicators of success at the completion of the process. A Client Profile Form (see Figure 2) can be sent to the client and returned to the coach before the first coaching conversation.

Setting Goals

The next step is to help the client identify areas for learning and development and to set goals. The client's success in whatever s/he chooses to do depends on the ability to set goals. Goals will keep the client looking toward future possibilities rather than focusing on what is not working. Choosing and setting goals means they are serious about taking charge of their life.

When setting goals, it is important for the client to remember that a goal should be:

- Realistic (I can do it)
- Desirable (I want to do it)
- Motivating (I will work to make it happen)

Goals should be specific, time-framed, reachable and relevant. Goals are about concrete action; a matter of facts, not feelings. Setting clear goals involves converting a dream from a vague idea into an action-oriented goal statement from which one can design an action plan.

Clients may need to re-evaluate and alter their goals as they move toward their vision, or they may change their vision as they are presented with new learning. Even if the vision changes, the client can build on the activities and resources used in meeting previous goals.

Through working collaboratively, the coach can help the client clarify goals and provide

Figure 2 – Sample Client Profile Form

Name _____
Mailing Address _____
Phone number _____
E-Mail _____
Age: <35 ____ 35-44 ____ 45-54 ____ 55+ ____
If working, current position:
What issue(s) would you most like to focus on in the coaching session? E.g. career, performance, lifestyle, other? If more than one issue, please rate their importance with 1 being most important.
On a scale from 1-10, how would you rate your current satisfaction with the issue(s)?
If this coaching is successful, what will be different for you?
Is there anything else you would like me to know?
Please return this form prior to our first coaching session. Thank you.

the tools for action and learning that will lead to the results the client wants to achieve.

Collaborating is what happens when both coach and client manage a two-way discussion that achieves the agreed upon goals. This is the essence of the coaching conversation where the coach facilitates the growth and development of the client's self-efficacy (an estimate of the client's own capacity to perform a certain task) by supporting, encouraging and challenging the client to expand their ability to achieve their goal(s). The outcome of the work the coach and client do together is action and learning. Action moves the client forward and learning creates new ways of being.

Effective communication will facilitate the client's learning and the ability to take action and achieve results. Communication is the foundation of nursing practice and something that nurses understand and do well. Those skills can be transferred to the role of coach. The coach uses a variety of communication skills including questioning, listening, observing and giving feedback to assist the client to take action and grow. The coach can also assist with an action plan and with learning by encouraging the client to develop a coaching action plan and record learnings in a journal. We will look at communication, action plans and journaling separately.

1. Communication

Powerful Questioning

The way a question is worded is very important in determining how the other will respond. Asking questions is both an art and a skill. The questions the coach asks should be open-ended, neutral, sensitive and clear. An open-ended question is designed to encourage a thoughtful answer where the client's feelings and perspectives are expressed. It is the opposite of a closed-ended question, which usually elicits a single word or very brief response. Open-ended questions are more objective and less leading than closed-ended questions (<http://www.mediacollege.com/journalism/interviews/open-ended-questions.html>).

A coach should probe, explore and challenge the assumptions and self-limiting beliefs that are preventing or blocking the client from realizing possibilities and moving to action. When there is resistance, assisting the client to focus on goals, sense of purpose and vision will help shift the client from a problem to future orientation. Always ask questions in a way that the client can express her or his own answers. If the client says "that is a good question," record it for future use. The following are some sample open-ended questions:

- What do you mean?
- Can you say more?
- How do you feel about it?
- Will you elaborate?
- How do you want it to be?
- If you could do it over again, what would you do differently?
- If you could do anything you wanted, what would you do?
- What will you do? When will you do it?
- What resources do you need to help you decide?

Exercise—Practice asking closed- and open-ended questions

- Find a partner.
- One person assumes a character in nursing, either living or historical and known to both people, e.g. Florence Nightingale.
- The other person asks a series of closed- then open-ended questions aimed at determining the identity of the character. Give yourself 5 minutes for this exercise.
- First, begin with closed-ended questions, questions which elicit a single answer, e.g. "Are you living?", "How old are you?", "Where do you live?"
- Once the questioner has some of the demographic and factual information, they then begin to ask some open-ended questions, questions which

elicit an unlimited amount of information and that may build on the answers to a closed question, e.g. “Describe the time in which you lived”, “Can you tell me your most important contribution to nursing?”, etc.

- Once you guess the character or give up, change places and repeat the exercise.
- Debrief — discuss the difference in the quality of the responses between asking closed- and then open-ended questions.

Active Listening

Often in communicating, speaking rather than listening has been given priority. In coaching, while clients may be looking for answers, they are also interested in empathy, sensitivity and understanding. It is the coach’s role to actively listen to what the client is saying as well as to notice what the client may not be saying, to probe, to clarify and reflect back to the client and to enhance the client’s ability to listen to herself or himself. Sometimes we leap to conclusions or draw the wrong conclusion based on limited information. The skill of clarifying is a combination of asking, listening, or reframing — testing different perspectives: “Here is what I am hearing ... is that right?” So the client can say: “Yes! That’s it!” or “No, that’s not it at all.”

Clients can change just by the way you listen to them. Non-verbal behaviour, including eye contact, smiling, nodding in agreement, and holding your body in a relaxed manner are all acknowledgments to a client that you are listening. Remember to focus on the client, not on your own need to give answers or advice, even in those situations when the client wants you to or wishes you would respond.

Exercise—Practice active listening

- Find a partner.
- One person, the storyteller, tells a two-minute story (i.e. about an event, an accomplishment, etc.). Remember to have a watch or timer handy.

- The other person, the listener, listens without interrupting for a period of two minutes. During that period, the listener will demonstrate the following behaviours:
 - During the first 30 seconds, the listener will sit down cross-legged; slump slightly in the chair; keep arms folded; attempt little eye contact; check his or her watch; frown; fidget with keys or other items.
 - During the next 30 seconds, the listener will make plenty of eye contact; not fidget; sit with legs uncrossed; lean forward; open hands; offer a couple of smiles.
 - During the next 30 seconds, the listener will do all of above but also make encouraging comments, e.g. “yes”; “right”.
 - During the final 30 seconds, the listener will do all of above, and ask some questions to develop the speaker’s theme.
- Debrief:
 - How did it feel as the storyteller?
 - What did you notice?
 - What effect did it have on the listener?

Observing

The coach helps clients step back and observe themselves so they can open themselves to new possibilities and action. The three domains of observation are language, moods and emotions, and the body.

- *Language* — It is through words that we generate new realities, open or close future possibilities, coordinate action with others, and shape our identity. This includes what is said and **how** it is said (inflection, volume, tone, etc.).
- *Moods and Emotions* — How we feel about an event or an activity generally affects our behaviour. Our emotions are usually framed in adjectives that describe our mood at a given time; for example, “I’m happy.”

- *The Body* — Our body language reflects our mood and how we feel. For example, the client may say “I feel great,” but the coach observes that the tone of the voice and the body language contradict this statement.

Case Study

The client has requested a meeting with the coach. The client arrives 10 minutes late for the meeting. Her eyes are darting all over the room, she is fidgeting with her hands and she appears unable to sit still in the chair. She sounded anxious on the phone when she called to book the appointment, and it appears she has been crying. She says nothing when she arrives. When asked how she is doing, she looks down and replies very softly “I’m fine. Everything is OK.”

Using the case study above, provide an example of each of the three domains of observation: language, moods and emotion, and the body language that the client exhibited.

1. Language _____

2. Moods/Emotions _____

3. The Body _____

4. Do you think this client is really “OK?”
Why or why not? _____

Compare your answers with those in the back of this workbook. How did you do?

Giving Feedback

The coach gives feedback to help the client grow and develop. Feedback is meant to be positive, not a criticism.

When giving feedback, ask permission; be honest; focus on the behaviour, not the person; be timely, specific and realistic; own the feedback; and offer continuing support. Have the courage to tell the truth. Clients need to expand their view of themselves through reflecting on others’ perspectives, acknowledging those areas where change is needed, asking for ideas on how to develop new skills, and, upon reflection, deciding what to do.

In summary, collaborating is what happens when both coach and client engage in a two-way discussion that achieves the agreed upon goals. Various communication strategies can be used, including questioning, listening, observing, and giving feedback.

The following — a sample dialogue between Reena, the client, and Sally, the public health nurse and a health coach — will give you an example of *collaborating*.

Sample Dialogue

Coach: Hi, Reena. It is good to meet you. On your profile sheet, you wrote that work-life balance has become a challenge for you. Can you tell me a bit about your situation?

Client: Sally, I’m exhausted at the end of the work week. I have no energy for my family, or for my personal life, including no time to exercise. I get short-tempered with my children, and I don’t like that. I’m feeling overwhelmed, and I don’t know how to change things.

Coach: Is there anything else I should know?

Client: The only other thing is that I was at my doctor’s office and she said my blood pressure was high, that my blood sugar is high, and that I need to take better care of myself.

Coach: First of all, good for you for wanting to make a change and take better care of yourself. Now, can you tell me, Reena, what work-life balance means to you?

Client: To be able to come home from work with energy to play with my children, to have time to do something for myself, and to feel healthy would be my ideal vision.

Coach: So what is getting in the way?

Client: Well, for example, I'm supposed to get off work at 3 p.m. each day, but I never get out on time, so then I'm late getting home. When I get home, the kids need me to help them with their homework, and I feel guilty because I'm so rushed. And then I can find no time to make a proper meal or exercise because the extra time I have spent at work is time I should be using for my family and myself.

Coach: With all that is going on and with your ideal vision of work-life balance, is there one area you would like to focus on between now and the next time we meet?

Client: I would like to work on starting to do

some kind of exercise a couple of times a week.

Coach: Okay. Let's begin by talking about your exercise routine right now. Can you give me an example of what you like to do, and what you don't like to do?

Client: Sure.....

2. Action Plan

A coach works with clients as they develop strategies to achieve their goals. Together a plan is created that includes action steps, resources, timelines, and indicators of success for each goal that has been identified. By creating an action plan, the client begins to move and to make decisions. Each decision

Figure 3 – Sample Action Plan

Long Term Goal Work-Life Balance Short Term Goal By the end of the month, I have built three hours of exercise into my week			
Action Steps	Resources	Timelines	Indicators of Success
start walking up three flights of stairs each day	workplace/shopping mall	today	I did it!
find an exercise partner	family, friends, colleagues at work	by the end of week one	one person has agreed to exercise with me
find a group exercise programme	see what the workplace offers in their health and wellness centre, investigate local gyms, get referrals from others who use gyms	by end of week two	I have two programmes to choose from
go and see the instructors, learn about the programme and sign up for a programme		by the end of week three	I'm registered
start my programme		by the end of the month	I have an exercise programme; I have blocked the time in my calendar and I'm feeling better about myself

builds on previous ones and leads to action. Each action then affects the choices they will make in the future. A plan and clearly defined goals will enable the client to build on options that guide them in achieving their vision. Finally, it is important to evaluate whether clients achieve their desired goals. As they proceed, the incremental steps they take to achieve their goals will become recognizable and, when reached, will provide them with additional incentives to persevere.

3. Learning Journal

A learning journal helps the client keep track of reflections and monitor progress and growth along the journey. Writing and/or drawing in a journal provides tangible evidence of personal discoveries throughout the process. The journal functions more as a place to think than a tool to use in any explicit way. When we can see what we're thinking, we can work with our thoughts in new ways. We break through our habitual patterns to discover our innate wisdom and creative genius. And when we do this, our lives transform. The client makes initial entries about their discoveries and insights after each coaching conversation and keeps his or her journal handy to consult and to add or delete information as needed. The journal will become a resource that he or she can rely on to make future decisions.

The following are some questions the client could consider for journal entries as a way to get started along with a sample journal entry.

- How am I doing?
- What is surprising me? Why?
- What do I think and feel about this experience?
- What lessons can I draw from this experience?
- What am I learning?
- How can I apply this information? For example, what is one thing I currently do that will be influenced by what I have learned?
- What are my next steps?

Sample Journal Entry from Reena

I met with my coach Sally today to discuss my progress in building three hours of exercise into my week. I'm really pleased with my progress. I'm also surprised at how many people agreed to be my exercise partner. Sally asked why I was surprised. That was a good question, one that I agreed to reflect on before we meet again.

I'm also pleased that I started to practice saying "no" when I was asked at work this week if I would volunteer to lead a new committee. Sally challenged me to reflect on why I have had difficulty saying no. In the past, I felt guilty for saying no, and, as a result, work-life balance has been a challenge for me. If my well-being is a priority, then I'm committed to not taking on more than I can manage and to adding some form of exercise into my schedule. I'm finding these coaching sessions so helpful. They really make me step back and question why I do what I do. I have got into so many habitual patterns and now I'm seeing myself and my behaviours in a new light.

So before I meet with Sally in a month, I need to:

1. reflect on my surprise that others agreed to help me
2. figure out why I have so much difficulty saying no and what I'm going to do about it
3. sign up for an exercise programme

Closing is that part of the conversation and of the relationship where the client gains clarification, commitment and the inner drive that produces results and takes responsibility for the next steps. Closing occurs at the end of each conversation and at the end of the relationship.

At the end of each coaching conversation, the coach should summarize the focus of the conversation, what the client has agreed to do before the next session, and set a date for the next session. It is recommended that the coach keep notes (See Figure 4) on each conversation just as the client is keeping notes in the journal. If you have access

to e-mail, contact the client and provide a follow-up summary consisting of an understanding of next steps or get the client to send you their next steps. This holds the client accountable, keeping them moving towards their desires and goals. Depending on the client, you may want to e-mail or phone between sessions to ascertain progress and provide encouragement.

At the end of the coaching relationship, both the coach and client celebrate the client's accomplishments and the transition to self-reliance and self-responsibility; they acknowledge that the client is ready to leave the coaching relationship and that s/he has the skills required to move forward alone. Because coaching is focused and time-limited, it is important to put a definitive end to the relationship regardless of whether this was a fruitful relationship or one that did not work out. The close of the coaching relationship could include a discussion on the experience and the knowledge acquired. Ask the client to come prepared to the final session to discuss the following questions:

- Think back to your purpose for embarking on this coaching relationship.

What are your accomplishments?
What are you most proud of?

- What have you learned about yourself along the way?
- What challenges did you encounter?
- What are your next steps?
- What additional help do you need?

Coach Feedback

After the relationship ends, you should also consider asking for feedback from the client to help you continue to grow and improve your coaching practice. Here are some suggested questions, please be as specific as possible in your answers:

- On a scale of 1 – 5 (1 is low, 5 is high), please rate the overall value of the coaching. Rating: ____ Please explain.

Figure 4 – Sample Individual Coaching Session Form

Client Name: _____
Phone: _____ E-mail: _____
Session: Face-to-face: ____ Phone: ____ Internet ____
Date: _____
Conversation # _____
FOCUS OF CONVERSATION
FOLLOW-UP

- What was your overall impression/assessment of your coaching experience?
- What was helpful? What was not helpful?
- What additional comments/feedback do you wish to share?

☐ Setting goals is important because: _____

☐ My client action plan includes: _____

The Coaching Conversation Checklist

Before moving on to Part Three, complete the checklist by answering the following questions:

☐ I have a space for coaching that is conducive to conversation, because (describe the space you will be using): _____

☐ I have a coaching agreement outline. Here are some things to include: _____

☐ I acknowledge the conversation is about the client and her or his agenda. I do this by: _____

☐ I recognize the importance of excellent communication skills and continue to work on improving mine by: _____

☐ I am open to feedback on my coaching practice. Please describe: _____

Check your answers with those in the back of this workbook. How did you do? Where do you still need to do some work?

Now that you have some idea of what constitutes a coaching conversation, you are ready to practice your coaching skills.

PART THREE:

PRACTICE COACHING EXERCISE

We are what we repeatedly do. Excellence, then, is not an act, but a habit.

Aristotle

This exercise will help you build coaching skills into what you already do. It is not meant to prepare you as a professional coach; that takes more formal, supervised preparation.

To begin, find two people to participate with you. Ideally set aside an hour to an hour and a half. Generate some possible coaching scenarios (refer back to the section “When Might You Need a Coach?” as a place to start) before you begin or co-create some scenarios with “the client” on the spot. In this process, you will have an opportunity to be a coach, a client and an observer. Each person will be required to both give and receive feedback. The following steps will ensure that everyone has an opportunity to experience all the roles.

1. Determine who will be the coach, the client and the observer. Adjust your seating so that client and coach can see and hear each other. The client chooses a scenario and begins the role-play. The coach uses the knowledge and skills acquired in Part Two to have a coaching conversation with the client. The observer uses the Feedback Form below to make notes.
2. Role play for 10 minutes until the observer calls “time.” Now you can practice giving and receiving feedback.
3. Rotate roles and repeat the process. Develop a new scenario.
4. Rotate roles one more time and repeat the process again using a different scenario.
5. Once everyone has experienced all three roles, reconvene and share observations and experiences.

If you find this exercise helpful, negotiate with your colleagues a regular time to come together to keep practicing. Remember that some new learning can be challenging. Mastery comes with time and practice. Keep on practicing, be patient, and be kind to yourself.

If colleagues are not available to practice with you, consider asking friends or family to help. Use the steps above to go through the process of holding a “coaching conversation” with your “client” and seeking feedback from the client and the observer. The important thing is to find opportunities to practice your coaching skills and to receive feedback on those skills.

Feedback Form

1. The *client* will describe her or his experience of the coaching session, what worked and what wasn’t helpful.
2. The *coach* takes three minutes to describe her or his experience, identify what s/he would do differently and acknowledge what went well.
3. The *observer* provides feedback to the coach, using the guidelines on the following page and giving examples:

Feedback Form

Coaching Conversation	Examples of Positive Behaviours	Examples of Areas for Improvement
<p><i>Climate Building</i></p> <p>Established a relaxed, informal and supportive environment conducive to dialogue and learning.</p>		
<p><i>Clarifying</i></p> <p>The purpose of the coaching conversation was articulated and the goals were identified.</p>		
<p><i>Collaborating</i></p> <p>A two-way discussion to achieve agreed upon goals occurred. This was enabled by the use of:</p> <ol style="list-style-type: none"> 1. powerful questions 2. active listening 3. observing 4. feedback 		
<p><i>Closing</i></p> <p>The part of the conversation where the client gained clarification, commitment, and took responsibility for next steps.</p>		

PART FOUR:

PROGRAMMES TO PREPARE AND USE COACHES

*Coaches function like the leaven in bread;
they are there for the long-term
development of results.*

Frederic Hudson

Preparation of Coaches

There are a range of skills required for effective coaching. These include observing, providing feedback, questioning to encourage self-discovery, leading, communicating, trust-building, problem definition and problem solving, decision making and conflict management. The International Coach Federation offers a comprehensive list of coaching competencies developed to address a range of coaching situations and intended to be used by individuals providing professional coaching services. The competencies include:

- Setting the foundation, meeting ethical guidelines and professional standards, establishing coaching agreements;
- Co-creating the relationship — establishing trust and intimacy with the client;
- Communicating effectively — active listening, powerful questioning, direct communication; and
- Facilitating learning — creating awareness, designing actions, planning and goal-setting, managing progress and accountability.

There are a variety of programmes offered for individuals who wish to be coaches. These programmes can range from a workshop on coaching skills development to graduate-level coach training programmes. Some of these may be accredited and offer the opportunity for certification by the ICF. Although accreditation or certification is not currently

mandatory, the trend is certainly headed that way. And even though the title *coach* is not protected, the ICF currently offers the only globally recognised coach credentials.

Workplaces also offer coach training programmes. These are often conducted onsite by an external source or they can be developed and conducted internally. These programmes tend to be specifically designed to fit the culture of the workplace and to respond to specific human resource issues within the workplace. They generally focus on an introduction to coaching skills and on applications within the workplace. Usually, they are comprised of a structured training programme that includes an in-class educational component followed by supervised experience in the practice setting, ongoing support/feedback, and programme evaluation.

Figure 5, illustrated on the next page, provides a list of the key components of an in-house coach training programme. This could serve as a checklist for you to determine whether an external or commercial programme has the content you need.

Figure 6, also illustrated on the following page, provides you with a sample of a coaching workshop that could be one component of an in-house coach training programme. This workbook provides the content.

Developing a Coaching Programme in Your Organisation

Now that you have an overview of coaching, the elements of a coaching relationship and how coaches can be prepared, you may want to consider developing a coaching programme in your organisation.

Within nursing, coaching programmes have been instituted (a) to smooth the transition from an educational to an employment setting (Nelson et al. 2004; Grealish 2000; Hom

Figure 5 — Key Components of a Coach Training Programme

<p>Content</p> <ul style="list-style-type: none"> • Coaching functions and competencies, e.g. observation skills, providing feedback, questioning, leadership, communication, trust-building, problem definition and problem solving, decision making and conflict management • The coaching process, e.g. goal setting, observation and feedback, questioning to encourage self-discovery and recognition, and reinforcement and rewards • Managing typical coaching scenarios <p>Learning Methods/Activities</p> <ul style="list-style-type: none"> • Workshop (see Figure 6) • A workbook of supporting documents to complement in-class instruction • Practice, observation and feedback sessions from a coaching expert • Ongoing access to and consultation with an expert coach as skills are developed in practice settings (face-to-face meetings, teleconferences, e-mail) • Periodic review sessions to facilitate reflection on learning and/or the coaching relationship • Mid- and/or end-of-programme seminars to continue development of coaching skills, share success stories/strategies <p>Evaluation Strategies</p> <ul style="list-style-type: none"> • Satisfaction surveys (coach and client feedback) • Coaching performance evaluation (pre-/post-training measures) • Indicators of organisational impact, e.g. retention data, staff satisfaction (align with overall goals that coaching programme was intended to achieve)
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Figure 6 — Coaching Skills Development Workshop

<p>PURPOSE</p> <p>To Provide Participants With:</p> <ul style="list-style-type: none"> • The knowledge, skills and tools to be beginning coaches • An opportunity for guided coaching with a colleague • Access to a mentor-coach for follow-up support <p>AGENDA</p> <p>1. Knowledge</p> <ul style="list-style-type: none"> • About Coaching <ul style="list-style-type: none"> ◦ What is coaching? ◦ How do coaching and mentoring differ? ◦ Trends ◦ The client ◦ The coach • The Coaching Conversation <ul style="list-style-type: none"> ◦ The coaching agreement ◦ Quality conversations 	<p>2. Skill Development</p> <ul style="list-style-type: none"> • Role Modeling <ul style="list-style-type: none"> ◦ What a coaching conversation looks like • Practice Coaching <ul style="list-style-type: none"> ◦ Opportunities for each participant to be a coach, a client, and an observer ◦ Opportunities to give and receive feedback <p>3. Follow-up Support</p> <p>Check-ins via e-mail or phone with facilitators/mentor coach to help participants build their coaching skills should be encouraged.</p> <p>Follow-up is very important, but if it is not possible, consider asking participants to use their journals to document how they are doing by identifying the skills they are working on and then describing the specific progress they have made on those skills from one conversation to the next.</p>
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2003); (b) to improve manager interactions with staff (Lachman 2000); (c) for educator development (Eisen 2001; Waddell 2005); and (d) to provide executive coaching for nursing leaders (Savage 2001). Team coaching has also been used to improve the performance of self-managed work teams (Savage 2001; Hackman & Wageman 2005). Using a “unit coach” to assist new nurses in the post-orientation period is a strategy that affirms and continues the development of professional competencies such as critical thinking (Nelson et al. 2004). Advanced practice nurses, educators or managers may assume the role of coach in any of the clinical applications of coaching programmes. Executive coaching for nursing leaders is usually provided by external professional coaches who facilitate the development of specific skills required for success in the leadership role.

Individual coaching can also be used in conjunction with workshops in which the participant has developed a plan of action and then uses a coach for follow-up support and help in ensuring that the plan is implemented. Although not everyone needs or takes advantage of the coaching, it does provide support for those individuals who need it. For them, it can make the difference between success and failure with an initiative. For example, ICN developed a programme, *It's Your Career: Take Charge*, which included a workbook to guide nurses in offering a workshop on career planning and development and follow-up individual career coaching (ICN 2001).

Coaching has also been used to foster scholarship in the clinical setting, to provide a method of communicating practice knowledge, and to help novices integrate the use of theory into their practice (Grealish 2000). Coaching can also be instrumental for the development of professional practice through an ongoing process of reflection that helps individuals change their ways of doing or thinking about their work (Eisen 2001).

Your organisation may want to offer formal incentives to both coaches and clients. For coaches, these incentives are usually related to the advantages that come from learning new skills or taking on new roles; the incen-

tive is actually the opportunity to enrich your experience and your résumé. For clients, the issue of incentives is more complex since for coaching to be effective, the client should come willingly to the relationship. If, however, the organisation feels it wishes to offer incentives, these could include time to participate in a coaching relationship and eligibility for advancement opportunities.

To assist you in the development of your coaching programme consider the four components of programme development: *planning, implementing, evaluating* and *sustaining*. Figure 7, displayed on the following page, provides you with a programme development checklist to help you with your initiative.

Developing a coaching programme within your workplace is a complex and time-consuming enterprise. It requires a great deal of planning and the support, both material and moral, of the senior administration. You may want to think about a programme as a longer-term goal and focus on developing some expertise in coaching and programme development yourself and with your colleagues before you undertake something more formal. Offering some limited coaching services to a small number of nurses to test out the interest and to practice your skills may be a more efficient and effective way to begin.

Exercise — Programmes to prepare and use coaches

Reflect upon what you have just learned and complete the following written exercise.

1. What are five key skills for effective coaching? _____

2. What are the differences between coaching skills development programmes and accredited coaching programmes? _____

Figure 7 – Programme Development Checklist

Planning

- There is agreement on the purpose, programme scope, goals/objectives and intended outcomes of the coaching programme (organisational and professional).
- A member of the senior team has been identified as the project champion to assist with ongoing support and communication.
- A designated project leader oversees the programme's implementation, maintenance and ongoing development.
- The budget is approved for implementation (initial and ongoing). Depending on the philosophy and policies of the organisation, you may include a discussion on formal incentives for coaches and clients.

Implementing

- Communication/marketing is under-way to key stakeholders (individuals who will be expected to enact a coaching/mentoring role as well as potential recipients of coaching/mentoring) through intranet, newsletters, posters, etc. Evidence from research and testimonials are included, and the programme is linked to organisational/professional goals.
- Regular reports are made to the senior team (through project champion).
- Space has been allocated to meet the demand for coaching/mentoring (i.e. private areas to conduct interactions).
- Library/Internet resources are available to support ongoing learning.
- Individuals have dedicated time within their current role to engage in coaching/mentoring activities (coach and client, mentor and protégé).
- Administrative support is in place to manage the logistics of connecting coach/mentor and client/protégé, tracking programme usage, collating evaluation data, etc.

Evaluating

- An evaluation component has been developed that considers the target populations, the indicators of success, and the process for evaluation.

Sustaining

- A process is in place to ensure the continuation of the programme by ensuring that the programme is consistent with the organisation's mission vision and values; is visible as a key component of other human resource strategies; has, where necessary, a period of stable funding; includes a means of recruiting coaches; is "advertised" in a variety of communication vehicles; and is subject to regular review and evaluation.

3. What is the role the International Coach Federation (ICF) plays in accrediting coach training programmes? _____

4. List at least two ways in which coaching can be used in organisations. _____

5. Describe how the four phases of programme development can be applied to an organisational coaching programme.

Compare your answers with those given at the back of this workbook. How did you do? Are there any areas where you still need to do some more work?

PART FIVE:

SUMMARY

I may not have gone where I intended to go, but I think I have ended up where I intended to be.

Douglas Noel Adams

Coaching is an interactive process that enables clients, who have identified a need for change in their personal or professional lives, to set goals and develop action plans. It is a conversation about possibilities and action, where the coach encourages and supports the clients as they reflect upon and acknowledge their potential, expand their horizons, and achieve their goals. To enable this exchange to occur and flourish, coaches need to see their clients as resourceful, whole and creative. They also must use a range of skills, including active listening, powerful questioning, observation and feedback, to assist clients in becoming the best they can be in such areas as performance, career or lifestyle. Coaching can also function as a valuable enrichment opportunity for nurses in their current roles or as an introduction to a new career path within nursing.

This workbook has provided you with the opportunity to learn about coaching and to practice having meaningful coaching conversations. Coaching focuses on where individuals are today and what they are willing to do to get where they want to be tomorrow. Through a process of self-discovery, goal setting and strategic action coaching can deliver extraordinary results. Coaching provides supportive, confidential, goal directed and time limited conversations about possibilities and action in which the ultimate objective is to help nurses become the best they can be.

The development of coaching skills presents tremendous opportunity for nurses to meet the challenges of retention, professional development and quality care. We are only beginning to see the potential for coaching to assist nurses with their colleagues and with their clients. This workbook is intended to help you begin to see what might be possible for you and for nursing. Developing these skills is part of continuous learning. We encourage you to use the workbook to help with your ongoing growth and development, and we wish you the best on your journey. Now that you have completed the workbook, test your knowledge and earn six continuing education credits (see page 4).

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SELECTED RESOURCES

The books, articles and Web sites that follow are only a sampling of the wide variety of coaching resources available. They are a place to begin. To further your knowledge, use the people and structures in your environment to help you expand your list of helpful resources. For example, consult the reference lists at the end of interesting books and articles, use your local or workplace library to find new references or surf the Internet using key words you've seen in what you've looked at so far. Finding resources is a bit like building blocks—start with one and then add from there.

Books/articles

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Web sites

<http://www.choice-online.com>

Choice is the magazine of professional coaching providing a diverse perspective, thought-provoking commentary, insightful discussion, and access to services, tools, resources and practical information on coaching.

<http://www.cipd.co.uk>

Coaching at Work is a magazine and an online resource of articles, tips and how to's, discussion and news about all aspects of coaching in the workplace.

<http://www.coachfederation.org>

The International Coach Federation (ICF) is a nonprofit, individual membership organization formed by professionals worldwide who practice business and personal coaching. The ICF exists to Build, Support and Preserve the integrity of the coaching profession through programmes and standards supported by the individual membership.

<http://www.thefoundationofcoaching.org/chronicle>

The Chronicle of Coaching provides a snapshot of what's happening in the coaching profession, designed to show where and how coaching appears in the popular culture worldwide.

<http://www.peer.ca>

Peer Resources, is a nonprofit, educational corporation, a primary source for peer, mentor, and coach resources.

ANSWER KEY

Page 11. “About Coaching” Checklist

- ✓ **Coaching and mentoring are not the same thing. How are they different?**
 - Coaching is a collaborative relationship, undertaken between a skilled facilitator (coach) and a willing individual (client). It is time limited and focused and uses conversation to help clients (individuals or groups) achieve their goals.
 - Mentoring is a longer term relationship in which someone with more experience and wisdom (mentor) supports and encourages another (mentee/protégé) as that individual grows and develops professionally and personally. While you may use coaching skills as a mentor, you do not need to be a mentor to be a coach.
- ✓ **What are four coaching opportunities for future development in health care?**
 - Peer Coaching
 - Health Coaching
 - Interprofessional Coaching
 - Succession Planning
- ✓ **How do I determine when I might need a coach?**
 - When you are not sure what your next career step should be
 - When self-limiting perceptions get in the way of being able to realize your dreams, goals or personal vision
 - If at any stage of your career you need help moving forward
 - If you are seeking work-life balance or need help deciding to take on new responsibilities and/or shed old ones
 - If you are considering how to reduce your workload so it is more manageable
 - If you are preparing for retirement or any other significant life change
- ✓ **I would find a coach by:** Checking at my work or other health care organisation. Professional organisations often have coaches available for members and some community organisations have coaches. Many self-employed coaches also provide coaching on a fee basis and also may be on a centralized roster; for example, with ICF as part of its Coach Referral Service.
- ✓ **One strategy to deal with a difficult coaching situation would be:** Discussing the situation with the coach and exploring the options for improving the relationship.
- ✓ **Describe how becoming a coach can be an enriching career opportunity:** Informal coaching is a natural part of a nurse’s day-to-day activities, whether talking with colleagues about their career visions or with clients about their health. Becoming a coach can be a rewarding career enhancement for you as you help colleagues and friends put their dreams into action.

Page 17. Case Study

Provide an example of each of the three domains of observation: language, moods and emotion, and the body language that the client exhibited.

1. Language: Anxious voice on phone, silence in person, soft response to questioning.
2. Moods/Emotions: Agitated, fidgety, anxiety, sadness, teary, reticence.
3. Body: Arrived late, darting eyes, fidgety, unable to focus, downcast eyes.
4. Do you think this client is really “OK?” Why or why not? No, she is not OK.

Her body language tells a story: Downcast, sad and darting eyes, appearing anxious and being late for a meeting she requested reveal clearly that she is upset. Her actions are a stark contrast to her spoken words. The coach should ask open-ended questions and be prepared to listen.

Page 21. The Coaching Conversation Checklist

I have a space for coaching that is conducive to conversation, because (describe the space you will be using): I have a relaxed, informal, comfortable, welcoming and supportive environment, conducive to dialogue and learning. My space assures privacy and prevents interruptions and distractions. I turn off my computer and mute or forward my phone. The seating is arranged so that I face the client. I do not sit behind my desk.

- √ I have a coaching agreement outline. Here are some things to include:
 - Customize for each client
 - Clarify the specifics of the relationship; process, scope, responsibilities
 - Address mutual expectations
 - Include a shared understanding of mutual commitment
 - Specify what each will do to ensure a mutually positive working relationship
- √ I acknowledge the conversation is about the client and her or his agenda. I do this by: Clearly stating in my agreement, “In each session you, the client, chooses the focus of conversation, while I listen and contribute observations and questions and evoke from you a vision and a plan for taking action.” And, “You, the client, promise that you will be prepared for each session and will come to each session willing to engage in a conversation about possibilities and action.”
- √ I recognize the importance of excellent communication skills and continue to work on improving mine by: Using a variety of communication skills including questioning, listening, observing and giving feedback to assist the client to take action and grow.
- √ Setting goals is important because: A plan and clearly defined goals will enable the client to build on options that guide them in achieving their vision.
- √ My client action plan includes: Action steps, resources, timelines and indicators of success for each goal that has been identified. By creating a plan, the client begins to move and to make decisions. Each decision builds on previous ones and leads to action.
- √ I am open to feedback on my coaching practice. I have developed a brief feedback form for my clients to complete so that I may receive constructive criticism in order to continue to improve my coaching skills.

Page 26. Exercise — Programmes to Prepare and Use Coaches

1. What are five key skills for effective coaching? Any five of the following: Providing feedback, effective questioning, leading, communicating, trust-building, problem definition and problem solving, decision making and conflict management.
2. What are the differences between coaching skills development programmes and accredited coaching programmes? There are a variety of programmes offered for individuals who wish to be coaches. These programmes can range from a workshop on coaching skills development to graduate-level coach training programmes. Some of these may be accredited and offer the opportunity for certification by the ICF. Although accreditation or

certification is not currently mandatory, the trend is certainly headed that way.

3. What is the role the ICF plays in accrediting coach training programmes? ICF currently offers the only globally recognized coach credentials.
4. List at least two ways in which coaching can be used in organisations: (1) to smooth the transition from an educational to an employment setting, (2) to improve manager interactions with staff, (3) for educator development, (4) to provide executive coaching for nurse leaders.
5. Describe how the four phases of programme development can be applied to an organisational coaching programme. They can be used as a model or development checklist to help design your initiative.

