

<b>ABM University Health Board</b>	
<b>17<sup>th</sup> January 2018</b> <b>Workforce and Organisational Development Committee</b> <b>Agenda item: 14</b>	
<b>Subject</b>	<b>Coaching Strategy</b>
<b>Prepared by</b>	Kay Myatt, Head of Learning & OD Louise Joseph, Assistant Director of Workforce & OD
<b>Approved by</b>	Kate Lorenti, Acting Director of HR
<b>Presented by</b>	Kate Lorenti, Acting Director of HR

## **1. PURPOSE**

To share with Workforce & OD Committee the final drafts of our Coaching Strategy and Policy and outline the risks and benefits relating to their ratification.

## **2. BACKGROUND**

Coaching skills have been delivered as part of Leadership Development and offered on a one-to-one basis for staff within ABMU and its predecessor organisations since 2006. However, the absence of a coaching policy and strategy has meant that this work and its impact on improving individual, team and organisational performance has not been widely understood or recognised.

One of the key components of ABMU's recently ratified Staff Experience Strategy (2017) is to continue to develop Coaching as a core Management Skill in line with Goal 4; Delivering Great Leadership, Management and Team Work. Furthermore, one of the recommendations from the Trusted to Care (2014) and its subsequent review was for the Health Board to introduce a coaching scheme for front line clinical leaders to improve staff and patient experience.

Research suggests that great people management creates a positive staff experience, which in turn leads to a positive patient experience. Through working with experienced and new coaches from across the organisation and partner organisations, our strategy and policy have been developed. They encompass an overarching vision of nurturing a coaching culture throughout the Health Board, which reflects our values and behaviours. In practice, this means creating a culture where coaching is the predominant style of leading, managing and working together and where there is commitment to grow the organisation and the people within it. With this in mind, our policy and strategy also aim to support ABMUs recovery and

sustainability programme with our 2-day Coaching for Improvement Workshops being delivered alongside our Improving Quality Together Service Improvement Programme.

Our draft Policy and Strategy has been co-produced and consulted on through an internal network of new and experienced accredited coaches from various disciplines across the Health Board over the past 12 months, which has included staff-side representation. Input and guidance has also been provided from partner organisations as part of the Wales Coaching Network.

Return on investment from this Strategy and Policy will directly link to the Key Performance Indicators to be developed for the Staff Experience Strategy and correlated to the data from the recent Values Survey (2017).

### 3. KEY ISSUES

The following table outlines the risks associated with ratifying the policy and the impact of not ratifying the policy:

<b>Risks of Ratifying</b>	<b>Risk of Not Ratifying</b>
<p>Raising the profile of coaching within ABMU will lead to increased demand. More staff will request formal coaching</p> <p>The need to train an additional minimum of 17 ILM Level 5 (or equivalent) Coaches in order to sufficiently offer staff and managers the opportunity for one-to-one Coaching and increase the number of facilitators able to deliver our Coaching for Improvement Workshop.</p> <p>The cost of expanding our coaching resource is between £10,693 and £25,415 depending on the level and type of Coaching qualification, method of delivery and provider organisation. Any costs however, would be an initial investment to save in the long term (see appendix 1 for breakdown of costs in relation to provider).</p> <p>Time for release for coach to attend</p>	<p>A coaching culture and style of management aligned to our values and behaviours would not be embedded and will lose momentum. The existing coaching resource is not sustainable for organisational size and impact.</p> <p>Limited internal coaching capacity would lead to staff accessing 1:1 coaching elsewhere at elevated consultancy rates.</p> <p>Limited improvement in local or national staff survey results in relation to opinions or experience of leadership and management within the organisation.</p> <p>Coaching enables individuals to realise their potential and this is particularly pertinent during a time of organisational recovery and sustainability. Decision not to expand our coaching expertise is a missed opportunity to drive effectiveness, efficiency and transformation.</p>

<p>training programme and to deliver coaching.</p> <p>Time for release for CPD of both newly qualified and existing coach's.</p>	<p>Coaching style of management, changes the conversation from a directive one to an empowering one and this directly correlates with staff experience and patient experience.</p> <p>Evidence suggests that coaching facilitates improvements on a personal and professional level, impacting on overall wellbeing. Not investing in coaching may directly impact on staff wellbeing and sickness absence.</p> <p>Failure to meet our commitment as set out in the Staff Experience Strategy.</p>
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#### 4. RECOMMENDATIONS

The Workforce & OD Committee is asked to ratify the Coaching Strategy and Policy and support the investment required to further establish and embed a coaching culture with a view to improve both staff and patient experience and ultimately lead to sustainability.

The Coaching Policy and Strategy Group recommend that for the training of the 17 additional Coaches, option 3 is selected as outlined in appendix 1. This would mean a bespoke ILM Level 5 Programme delivered in-house by the University of South Wales and offers the most cost effective option. It will also minimise travel costs with the programme being delivered on-site and as it is an accredited programme with an awarding body, offers quality assurance to the training those coaches receive and to the Coaching they deliver to staff.

## Appendix 1

### Breakdown of Costs According to Provider, Level of Qualification and Delivery Method

Provider	Level of Qualification and Awarding Body	Delivery Method	Cost
1. Neath Port Talbot College	Level 3 (no awarding body)	3 hours a week for 30 weeks taught and practical	£649 per person (£11,033 in total for 17 Coaches)
2. University of South Wales	ILM Level 5 Coaching & Mentoring	Open course 7 days taught and 12 hours practical, plus 3 assignments	£1,495 per person (£25,495 in total for 17 Coaches)
3. University of South Wales	ILM Level 5 Coaching & Mentoring	Bespoke course delivered at our organisation over 7 days and 12 hours practical, plus 3 assignments	£629 per person (£10,693 in total for 17 Coaches)



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# **ABERTAWA BRO MORGANNWG UNIVERSITY HEALTH BOARD**

## **Coaching Strategy 2017-2018**

### ***Coaching: For you, for me, for everyone***

**Caring for Each Other, Working Together, Always Improving**

**Policy Owner:** HR Director  
**Approved by:**  
**Approval Date:**  
**Review Date:** June 2018  
**Ref No:**

**To be read in conjunction with the ABMU Coaching Policy and Staff Experience Strategy**

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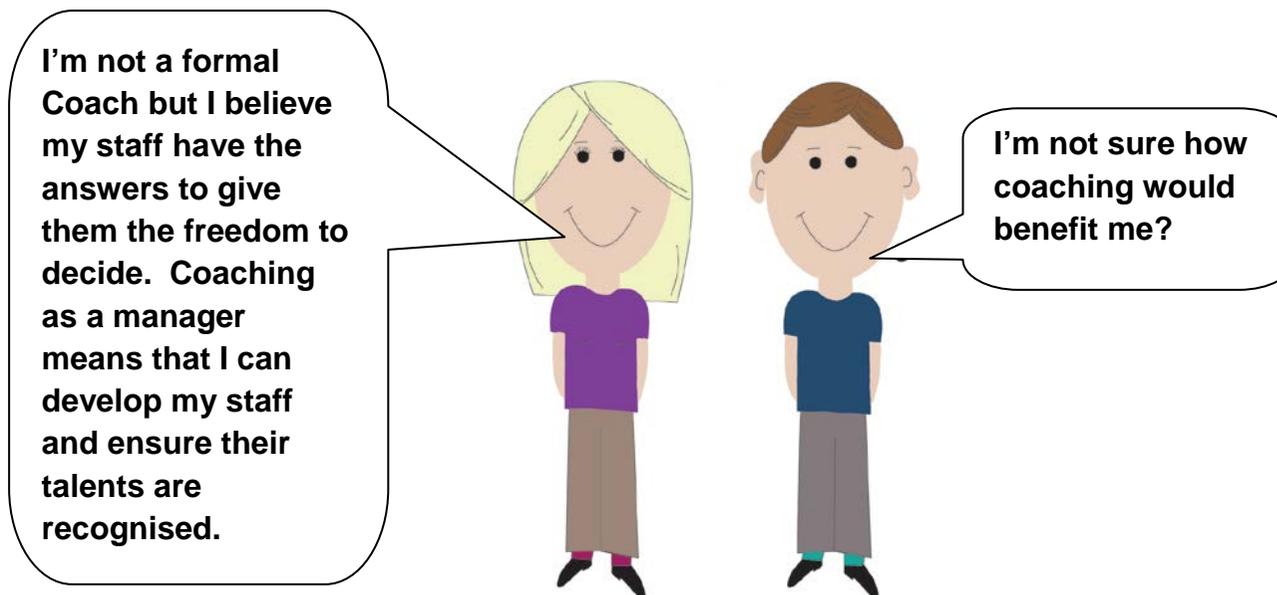


## 1. Introduction

- 1.1 In line with our Staff Experience Strategy; 'In Our Shoes: Creating Great Staff Experience at ABMU', this coaching strategy will support ensure that our line managers have the tools and support to develop great people management skills.
- 1.2 At ABMU, we believe that great people management creates a positive staff experience, which in turn leads to a positive patient experience. Coaching will be accessible for all staff and through working with experienced and new coaches from across the organisation. This strategy has been developed to encompass the vision for establishing a coaching culture throughout the Health Board, which reflects our values and behaviours.
- 1.3 Our aim is to create a culture where coaching is the predominant style of leading, managing and working together and where there is commitment to **grow the organisation and the people within it**. Staff will have the opportunity for a 1:1 relationship solely focussed on them, which recognises the wider context in which they operate.
- 1.4 This strategy also aims to enhance performance and sustainability at an organisational, team and individual level.

## 2. What is coaching?

- 2.1 **Coaching** is unlocking an individual's potential to maximise their own performance through having a facilitated and structured, confidential conversation.
- 2.2 An experienced coach can use their skills without the need to understand the area in which the coachee works. A coach uses their experience and knowledge in facilitating a coaching conversation to assist the coachee to reach their own solutions and conclusions.
- 2.3 ***“Coaching creates the opportunity to objectively look at a situation and explore all options. The discipline of questioning by a qualified coach can really challenge our personal beliefs and give freedom to any possibilities. Coaching allows us to find the answers and coping strategies within ourselves which means we continually grow and develop”.*** ABMU Staff Member, 2016

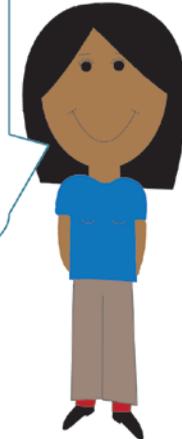


### 3. The Benefits of Coaching – Real Life stories



*Effective listening skills which provided me with space to think and encouraged me to relate my strengths to my role*

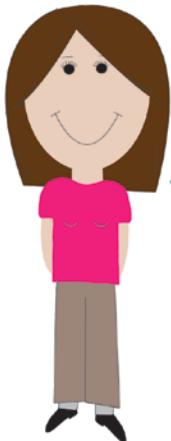
*The session gave me the opportunity to think out loud, air my views and opinions safely. My Coach made sure I did most of the talking but kept steering me back to the issue as I had a tendency to go off subject. I found myself answering my thoughts and suggestions and having “light bulb moments”. Because my Coach understood my personality and was aware of my values and beliefs I felt this really helped.*



*My coach demonstrated empathy without leading and encouraged me to identify achievable objectives to address issues*



*“It gave me the opportunity to think/talk things through to an outcome that is perhaps more honest and less critical than I would have allowed myself to come to, if the conversation had taken place in my head”.*



*I now have clearer focus on what I want, I now see other options open to me that I wouldn't have otherwise considered*

*I have a better understanding of how I feel about what I intend to do, it has been very useful to look at things from a different perspective*



*“The most useful aspect of coaching was being guided to certain realisations – not telling me!”*

*“Coaching has achieved what I had hoped and more!!”*



#### 4. Coaching Vs. Mentoring – same or different?

- 4.1 We take pride in mentoring staff and teaching them new skills enabling them to be competent in their roles by imparting new information, advising and guiding.
- 4.2 Coaching is different however, with the solutions and decisions being made by the coachee and discussions focussed on the outcomes that the coachee wants to achieve.
- 4.3 The following table outlines some of the key differences in more detail:

<b>COACHING</b>	<b>MENTORING</b>
Relationship typically short-term	Ongoing relationship that is longer-term
Structured format and meetings held on a regular basis	Informal and meetings can take place as and when the mentored individual needs some guidance and / or support
Focused on specific development areas/outcomes	Takes a broader view of the individual's development and is career/profession focused.
Coach doesn't need direct experience of client's role	Mentor usually passes on experience and is normally more senior in the organisation or profession
Agenda set by coachee; focused on specific immediate goals	Agenda set by mentee; mentor offering support & guidance in preparation for future roles

Chartered Institute of Personnel and Development (CIPD), 2011

## 5. What do we want coaching to look like in ABMU?

...*coaching will be available for all*

- Voluntary relationship between Coach and Coachee
- Formally through 1:1 structured coaching sessions facilitated by a qualified coach
- Informally in the day-to-day management of staff
- To enhance management practice (i.e. via PADR, supervision, meetings etc.)

...*coaching is a positive interaction*

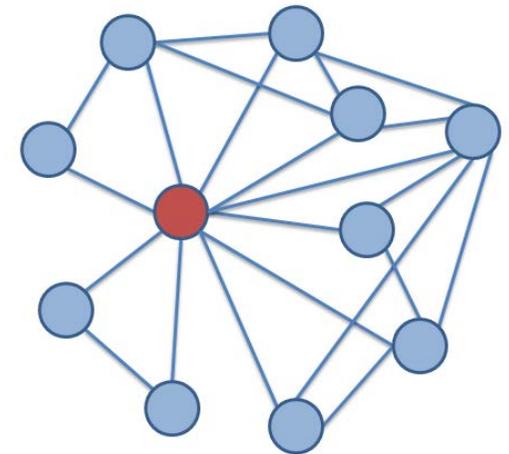
- Benefitting the coachee and Coach
- Identifying and nurturing future talent / succession planning
- Not used as a punitive tool

...*coaches will be continually supported and developed*

- Network of coaches that share experiences / ideas
- Coach supervision offered
- Training more coaches and embedding coaching into leadership

...*coaching improves staff and ultimately patient experience*

- Increase in staff engagement
- Improved patient experience
- Evaluation / measurement results



## 5.1 ABMU Coaching Action Plan

Where are we now?

Where do we want to be?

How will we get there?

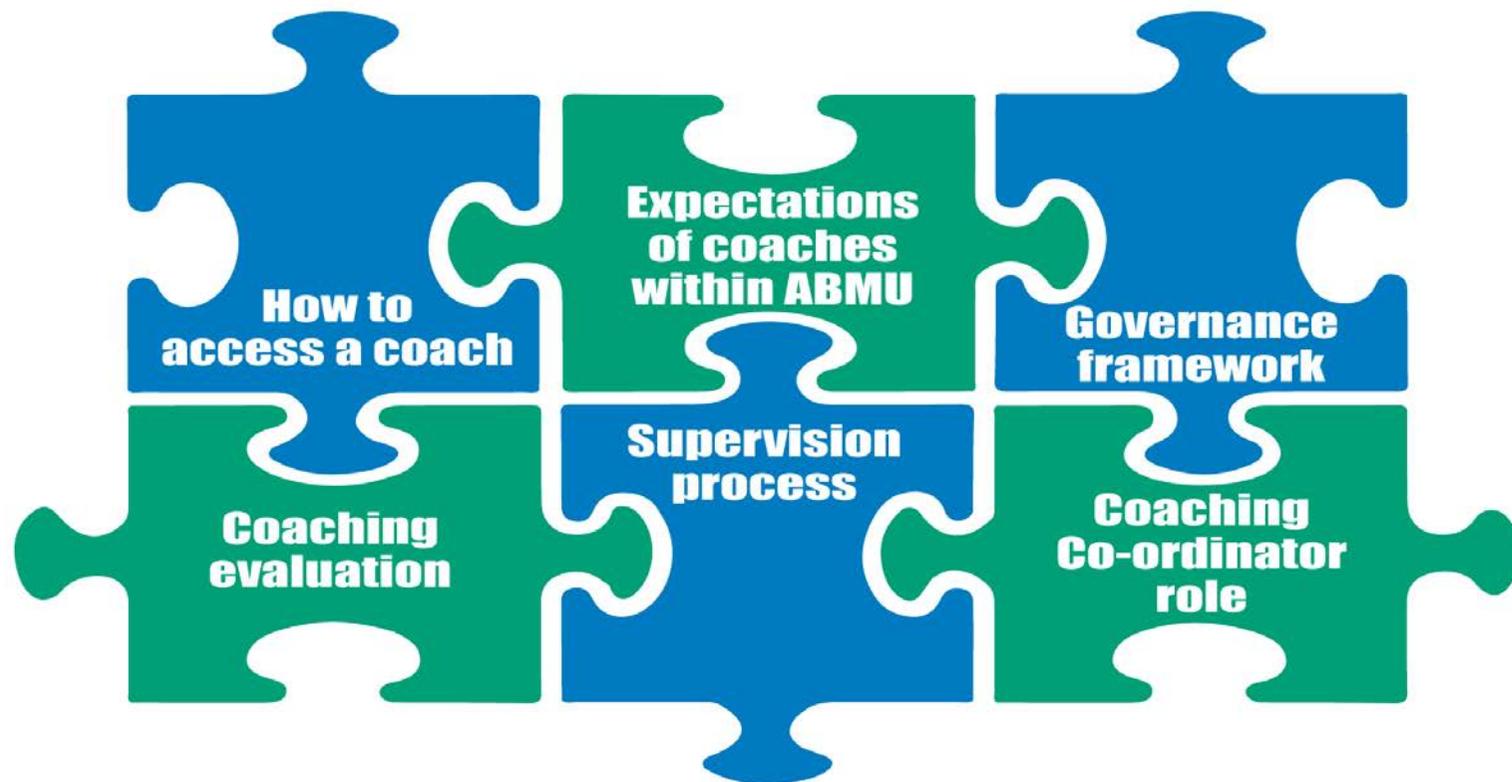
When will it be?

NOW	FUTURE	ACTION	DATE
33 practising and trainee coaches and 5 qualified coach supervisors	Increase to 50 across ABMU	GAP analysis on coaches per SDU Identify potential coaches Source / fund more training Offer relevant qualification to those interested Set up individual and group Coach supervision and CPD sessions	September 2017  November 2017 December 2017  January 2018
Use local staff surveys to identify current levels of awareness / engagement in Coaching	Implement a communication plan for the promotion of coaching and its benefits	Work with the communications team to develop a plan Tap into local and national key dates e.g. Adult Learners week, International Nurses Day etc. to promote Coaching and the launch of the Strategy and Policy	July 2017 on-going

NOW	FUTURE	ACTION	DATE
<p>24 staff contacted L+D between 31<sup>st</sup> March 2016 to 1<sup>st</sup> April 2017 to request coaching</p> <p>40 managers registered to attend ABMU's 2-day Coaching for Improvement Workshop</p>	<p>Monitor and report the number of requests for coaching over the next 12 months with the aim to increase interest by 50%</p>	<p>Clarification of the role and responsibilities for ABMU Coaching Coordinator.</p> <p>Development of monitoring tool</p>	<p>July 2017 on-going</p>
<p>Integration of Coaching Policy and Strategy with the goals of ABMU's Staff Experience Strategy</p>	<p>Evidence of return on investment linked to the key performance indicators set out in the Staff Experience Strategy and Workforce Metrics</p>	<p>Coaching Co-ordinator nominated to working with SDU coaching leads to monitor and record impact</p>	<p>From September 2017 on-going</p>
<p>No talent management plan</p>	<p>Develop coaching as part of the talent management pathway</p> <p>Coaching offered alongside leadership and management development</p>	<p>Work with HR colleagues and SDU coaching leads to offer coaching</p>	<p>From September 2107</p>

## 6. Coaching Policy and Processes

6.1 As coaches, Trade Union Representatives and coachees, we have developed a Coaching Policy to be read in conjunction with this strategy. The Coaching Policy details the following information and can be accessed by clicking this link:





## 7. Coaching across organisations

7.1 ABMU is working partnership with other NHS Wales and Public Sector organisations to support the development of the Wales Coaching Network, hosted by Academi Wales.

7.2 Academi Wales is keen to enhance the coaching opportunities that exist in the public sector across Wales. The key aims of setting up the Coaching Network and appointing designated Coaching Co-ordinators per public body are to:

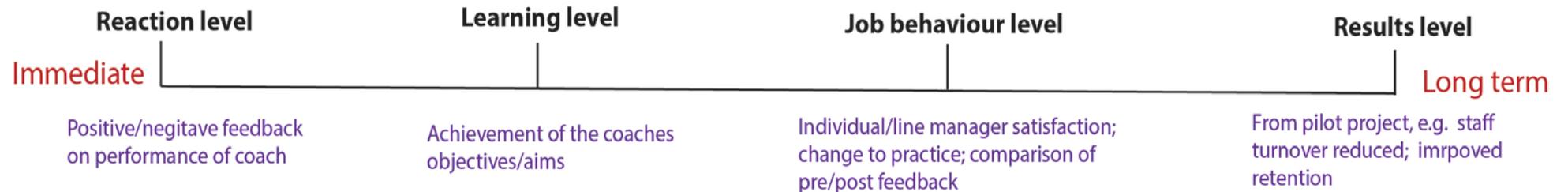
- Create a cross-coaching culture where those seeking a coach can do so both via their own organisational set up, but also by having an option to explore alternative coaching offered by partner organisations
- Provide opportunities for public sector organisations to draw on each other's expertise and shared resource
- Provide opportunities for those who coach to develop their own expertise by offering to coach in different sectors and locations (time and capacity permitting)
- Build a clearer and co-ordinated picture of coaching practice and demonstrate the demand / supply and the return on investment across the public sector in Wales
- The network aims to provide:
  - Consistent referral process
  - Wide network of coaches
  - CPD sessions for coaches
  - Consistency of criteria / training for coaches – quality assurance

7.3 To access the Academi Wales Coaching Network, please click the following link:  
<https://academiwales.gov.wales/pages/coaches-and-mentors-intro>

## Monitoring and Evaluation

- 7.4 Evaluating return on investment from embedding a coaching culture will be undertaken at a variety of levels.
- 7.5 To achieve a cultural change we are linking coaching across ABMU with the Values Programme and the ABMU Staff Experience Strategy. Measurement will be linked to Workforce & OD Metrics and feedback from staff via both national and local surveys and from Patients via mechanisms such as the Friends and Family Test, Putting things Right and You Tell Us.

### Level



### Examples



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# **ABERTAWA BRO MORGANNWG UNIVERSITY HEALTH BOARD**

## **Coaching policy**

**Policy Owner:** Director of Human Resources

**Approved by:**

**Review Date:** December 2017

**Ref No:**

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Abertawe Bro Morgannwg approach to coaching is underpinned by our values, “Caring for each other, Always improving and Working together.”

## **1. Introduction**

- 1.1. Abertawe Bro Morgannwg University Health board herewith referred to as the “Organisation” and recognises the importance of supporting staff in the workplace ultimately to improve patient care.

## **2. Scope of the policy**

- 2.1. The policy will define coaching within the Organisation and set out the responsibilities of the Board, Service Delivery Units and Directorates, managers, supervisors, line managers of coaches, employees, coaches, coachees, Trade Unions, Learning & Development Department and the Coaching Co-ordinator’s roles. In addition the policy will define the processes for:
  - Accessing a coach.
  - Becoming a coach.
  - Supervision of coaches.
  - Evaluation of coaches and of coaching sessions
  - Raising concerns.
- 2.2. The policy will furthermore signpost to other alternative supporting methods available for all staff within the Organisation to aid the development of their skills and work processes. These include but are not limited to action learning sets, supervision including clinical, mentorship, preceptorship, traditional learning & development learning. Information on these activities can be found on the Organisations intranet site.
- 2.3. Coaching is open for all and can take the format of formal one to one, or a more informal approach through staff using a coaching style to communicate and support others.

## **3. Aims**

- 3.1. To develop a culture across the Organisation, in which coaching is seen to be used by all staff as a positive approach to develop themselves, their teams and their services in support of the values of the Organisation and to provide the very best health care for local people.
- 3.2. The ultimate aim of introducing a coaching approach is to empower, motivate and develop staff to improve their personal performance and that of their team and in so doing, improve the performance of the overall Organisation. Coaching

in the context of the Organisation is about improving patient service and experience through maximising the skills and abilities of all staff throughout all levels of the Organisation. This is further supported by the Values of the Organisation: “Caring for each other, Always Improving and Working together”

## 4. Definitions

### *Definitions: Mentoring, Training, Counselling and Coaching,*

- 4.1. **Mentoring;** is where the mentor provides advice, guidance and support and acts as a sounding board. A mentor must have knowledge and experience within the subject matter.
- 4.2. **Training;** is a structured process to provide attendees with the knowledge and skills to perform tasks, usually delivered in a formal/teaching environment.
- 4.3. **Counselling;** is a skill that helps clients who may have lost the necessary inner resources to resolve their own issues. This must be completed by a qualified professional counsellor.
- 4.4. **Coaching;** is unlocking an individual’s potential to maximise their own performance. As formal 1:1 coaching session will be lead by a qualified coach, however, could be a coaching conversation with a colleague or other appropriate person.
- 4.5. An experienced coach can use their skills without the need to understand the area in which the coachee works, as a coach uses their skills, experience and knowledge to assist the coachee to reach their own solution.

## 5. Equality and Coaching

- 5.1. Developing and supporting staff, at all levels, through a variety of supporting interventions the Organisation can strive to ensure that our core values are met and the main principles of Equality, Diversity and Human Rights will underpin our strategic direction and operational delivery of health care services.
- 5.2. Any staff requesting coaching or who may be interested in becoming an internal coach will be monitored against the protected characteristics.
- 5.3. Where possible the delivery of coaching through the medium of Welsh will be offered to staff when requested.
- 5.4. Reasonable adjustments will be considered where appropriate to ensure the equality of access for all.

## 6. Responsibilities

Responsibilities	Board	Service Delivery Units & Directorates	Managers & Supervisors	Line Managers	Employees	Trade Unions
Promotion of the concept and benefits of coaching	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Exhibit a Coaching style of Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Support identification of suitable staff to become coaches and ensure they have time to complete their studies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Support staff to attend internal coaching courses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Understand that an internal coach is an ongoing development of skills & time may be taken away for their main role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Be Aware that being registered as a coach may involve supporting staff external to ABMU (discussed with Manager)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Understand that any coaching should minimise any disruption to their normal role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Understand that internal coaches are best used outside their own team/department or service	<input checked="" type="checkbox"/>					
Understand that staff have access to the organisations pool of qualified internal coaches	<input checked="" type="checkbox"/>					
Understand that a coaching style of management enhances and supports processes such as PADR, Chair Meetings, Clinical supervision, Mentorship etc	<input checked="" type="checkbox"/>					
Support staff to access coaching where a need has been identified	<input checked="" type="checkbox"/>					
Support the internal Coach allowing time for development and supervision to take place	<input checked="" type="checkbox"/>					
Opportunity to have access to a formal coach	<input checked="" type="checkbox"/>					

## Trade Unions

- 6.1. Any member of staff who is a member of any recognised trade union will have the same opportunity as any other member of staff in accessing a qualified internal coach.
- 6.2. All trade unions recognised within the Organisation will be required to support this policy.

## Coach

- 6.3. It is vital that workforce coaches should have their coaching skills recognised by the Organisation. Each coach will be required to continue to improve their skills and experience and to provide a good service for colleagues. In some cases this

might be through their job description, but more likely in their PADR process with at least one objective relating to their coaching practice, as well as their personal development needs being highlighted.

6.4. Issues of personal safety also need to be recognised and whilst coaches will need to protect the confidentiality of their coachee, it is important that colleagues are aware of where a staff member has gone and when to expect them back if they are away from their post coaching.

6.5. Workplace coaches are staff who are specifically trained to support the formal and informal development of others to enhance their performance, enabling them to reach their potential and increase their skills and knowledge. Their role will be vital to the success of the strategy.

6.6. By becoming a workplace coach – an individual will be committing to:

- Completing a recognised Certificate in Coaching
- Coach a minimum 4 people per PADR year
- Attend at least 2 supervision session each PADR year, this will be increased for coaches during training or newly qualified as appropriate, this can take the form of:
  - 1:1 supervision with a qualified coach supervisor
  - Group supervision with a qualified coach supervisor
  - Group reflective practice with a peer support group of coaches
  - 1:1 reflective session with a qualified coach
- Attend sessions with an identified coaching buddy which will be allocated to all newly qualified coaches
- Undertake a minimum of 12 hours of formal contracted coaching per year
- Request written feedback from each coachee, to evaluate the impact of the coaching and improve performance
- All Coaches will be required to upload a profile, see appendix 2, including a photograph to the Academi Wales website, <https://academiwales.gov.wales> each coach will be required to create an account and to keep the information up to date.
-

6.7. CPD of Coaches, All coaches to undertake a minimum of 10 hours of coaching CPD, this can take the form of:

- Attending conferences or workshops
- Attend local coaching networks meetings
- Reading books, online journals or blogs

## **Coachee**

6.8. An individual who has identified an issue that could be best met by workplace coaching will apply for such support using the standard corporate application process. If this is during normal working hours then this should be discussed with an appropriate supervisor/manager. Access should be organised not to cause unnecessary workload or service delivery difficulties.

6.9. During the first coaching session the coach and coachee will work through the coaching contract (Appendix 1) to establish the expectations of all concerned.

6.10. Individuals will also be required to keep their line manager informed of progress against their objectives (but not the details of discussions) as appropriate.

6.11. Agree to provide written to evaluate the impact of coaching

## **Learning & Development Department**

6.12. The Learning & Development department will be responsible for the co-ordination of:

- The activities of each coach, number of hours etc
- Organise and supervise regular supervision sessions
- Provide information of any appropriate additional coaching events
- Keep all coaches informed of any changes in processes, policies and Strategy
- Act as a conduit of requests made by staff seeking a coach

## **Coaching Co-ordinator**

6.13. The Coaching co-ordinator will maintain a register of active internal ABMU coaches, recording details of active qualified coaches and those in training for a qualification. Details to be captured would include location, qualifications, coaching profile, availability and CPD record.

- 6.14. A coaching profile will be kept by the Coaching co-ordinator on all active coaches, which will also reflect the coaching profile uploaded to Academi Wales Coaching Website. See Appendix 2

## **7. National Coaching Network**

- 7.1. All coaches are required to be registered with Academi Wales and to follow their guidelines
- 7.2. <https://academiwales.gov.wales>

## **8. Confidentiality**

- 8.1. Coaching is confidential between the coach and coachee. Exceptions to this would be in the event of: -
- A breach of the Professional Code of Conduct for Coaches
  - A breach of the Organisations policies & procedures
  - A breach of Health & Safety Policies
  - A person being at risk to themselves or others
  - Illegal or unethical actions
- 8.2. Should any of the above be experienced, this should be raised during the regular coaching supervision sessions, where possible, however, should be reported via the Coaching Co-ordinator if required and if the individual wishes to disclose the information to their individual manager?

## **9. Records**

- 9.1. Each coach will be responsible for any records kept, ensuring they maintain complete confidentiality. Each is required to explain the coaching contract the prospective coachee during the first session. See Appendix 1.
- 9.2. Accurate records to include:
- All requests made for coaching
  - All formal contracted coaching activity
  - CPD activity
  - Coaching contracts and evaluations
  - Supervision

## 10. Supervision

- 10.1. Supervision is the responsibility of the individual. A programme of CPD and supervision support will be developed by the coaching co-ordinator and made available for all internal coaches as a mandatory requirement for ongoing membership of the ABMU Coaching Register. This may be a combination of an internal or via an external supplier.
- 10.2. The European Mentoring and Coaching Council (EMCC) states in its code of ethics "A coach/mentor must maintain a relationship with a suitably qualified supervisor, who will regularly assess their competence and support their development."
- 10.3. All coaches will have at least one coaching supervisions session with a qualified coaching supervisor every six months. The Coach will provide evidence of their continuing Coaching practice and will inform the supervisor of the number of hours spent coaching. It is the responsibility of the coach to organise the supervision sessions and to keep relevant records that may be required under CPD.
- 10.4. A model of the supervision session can be found in Appendix 5

## 11. Appendices

- Appendix 1 Coaching Contract
- Appendix 2 Coaching Profile
- Appendix 3 Coaching Appointment
- Appendix 4 Coaching Network Evaluation
- Appendix 5 Coaching Supervision
- Appendix 6 Accessing a Coach
- Appendix 7 Coaching process
- Appendix 8 Becoming a Coach

## Appendix 1 Coaching Contract

**It is a requirement that all parties examine this contract together in the introductory session, to ensure mutual understanding of the basis of the coaching relationship, roles and responsibilities.**

### The Coach's Ethical Approach

In a coaching relationship, the coachee agenda is at the centre of the relationship and will be worked on jointly by both coach and coachee. As coach I do not have the answers to your issues, but I am committed to working with you to explore them and help you identify how to move forward. I will at all times do my best to help you achieve all you want for yourself but there are no guaranteed results; you get out what you put in.

At all times, I will treat you with respect and treat all you tell me in confidence. There may be occasions when something you share with me needs to be shared more widely, but we will discuss this first so that you are comfortable, and wherever possible, you will take the lead in sharing the information with others. I may be asked to feed back generic information regarding issues such as learning needs, how services are faring generally or other points that can help inform further programmes; I will not however feed any such information back if I cannot completely guarantee confidentiality.

As an internal ABMU service coach, I will work with a variety of people who may, or may not be known to you. I will let you know if there is likely to be a conflict of interest. Where we work together with this knowledge of others, the focus of our work will be on your situation and your responsibilities. I will not therefore refer to situations or any knowledge I have about these individuals, gained from my interactions with them.

**Name of Coach:**

.....

**Signed:** ..... **Date** .....

**Name of Coachee:**.....

I agree that the prime purpose of this coaching contract is to support, maintain and enhance my personal development and performance over an agreed period of time. As the coachee, I will ensure that, to the best of my ability, I have met the agreed objectives and action plan set out at the end of each session.

We have both agreed the parameters of this relationship and discussed their practical implications for us. We have agreed to meet every .... weeks for ..... sessions. We have agreed that 1 to 2 hours is a suitable length of time for our sessions. We will time these sessions to coincide with specific stages of work or situation, so that constructive feedback can be provided and objectives reviewed. It is the joint responsibility of both the coach and the coachee to agree the scheduling of these sessions.

Our first coaching session will be on:

**Date:** .....

**Time:** .....

**Venue:** .....

If for any reason a session is cancelled, we will meet again at the next mutually convenient date. The person who has cancelled the session has the responsibility to re-arrange the session. Each coach will have their own cancellation policy, considering how many sessions can be cancelled before they review the situation with their coachee and consider ending the relationship.

I understand that taking part in this coaching contract places responsibilities on me. I agree to prepare for each session, to be punctual and to actively participate. I agree to carry out any follow-up actions that I choose to commit to within the coaching sessions as per agreed timescales. I understand that all that is discussed between us will be treated in absolute confidence, unless we agree that information can be shared with another party.

I agree to complete all evaluation forms during and following the final session.

I will ensure that the session is not interrupted, in order to give full attention to the interaction.

Any changes in circumstance will necessitate the discussion and agreement of a new coaching contract.

Either party can request a termination of the agreement if there is a breakdown in the coaching relationship, inadequate commitment to the process or lack of progress being made.

I have read, and agree, this coaching contract.

Signed:

**Coachee:**..... **Date:** .....

**Coach:**..... **Date:** .....

**Line Manager:**.....**Date:** .....

## Appendix 2 Coaching Profile Template

Coach		Insert Profile photograph
Telephone		
E-mail		
Based in		
My Coaching Story		
My experience		
How I coach		
Where am I willing to coach		
One line to sum me up		

## Appendix 3 Coaching Appointment

Abertawe Bro Morgannwg University Health Board

### 1:1 Coaching Appointment

You have booked a 1:1 coaching appointment with me and in order to help ensure you get the most from our session, I've prepared this simple proforma.

Please take a few minutes to complete the details and consider what you'd like to work on so that we can maximise our time together.

<b>Name:</b>	<b>Current Role:</b>
<b>Post(s) being applied for:</b>	<b>Interview date(s) if known:</b>

The issue I want to focus on in my coaching session today is:

And what I'd like to walk away with from the session is:



## Appendix 4 Coaching Evaluation Form

### Part One:

I was Coached by:

1. Was this your first experience of working with a coach    Yes     No

2. How many coaching sessions have you attended with this Coach :

1-3     4-6     7+

3. Please indicate the frequency of your coaching sessions

4 weekly     6 weekly     8 weekly     Other

4. Please indicate your primary objective(s) in embarking on coaching:

- Assisting with personal development needs
- Assisting in your own career planning
- Support with professional relationships /managing others
- Support for Organisational initiatives
- Other (please specify) .....

.....

5. How well did coaching help you meet this objective/these objectives?

(Please tick one box only)

Extremely well     Very well     Reasonably well     Not very well     Not at All

**How good was your Coach at.....**

Excellent    Very Good    Fairly Good    Poor

6.	Demonstrating good time management practices and keeping agreed appointments				
7.	Allowing you to set the agenda for your sessions				
8.	Keeping a check on the points agreed during your sessions and feeding these back to you including reviewing points from previous sessions				
9.	Establishing rapport with you – listening to what you said, giving clear responses and summaries, communicating openly with you etc.				
10.	Explaining clearly any necessary concepts, information and techniques giving clear, concise and constructive feedback				
11.	Using questionnaires and/or self-assessment profiles (if appropriate) to help you understand yourself better				
12.	Ensuring you retained responsibility to solve problems and change your behaviour gaining your commitment to a Personal Action Plan				
13.	Managing your emotions, displaying empathy with your thoughts and ideas				

14. Would you recommend your Coach to others?    Yes     No

15. If you would like to provide a testimonial for your coach please provide your comments here:

**Your Name (optional):**

Please tick this box if you would prefer your testimonial to be anonymous.

**Part Two**

All development initiatives should deliver some Organisational benefits. It would be helpful to know how you felt coaching as a development activity worked from this point of view by answering as many of the following questions as possible.

<i>Please put a tick in <b>one</b> box for <b>each</b> statement to indicate how you work differently as a result of coaching.</i>		Strongly Agree	Agree	Disagree	Strongly Disagree	Too early to say
1.	I give my own development more priority					
2.	I am more likely to set myself goals or targets					
3.	I am more aware of the impact of my behaviour on others					
4.	I am more aware of my strengths and weaknesses					
5.	I am more aware of my motivations					
6.	I am more effective at developing strategies					

	and planning					
7.	I use a wider range of leadership styles for different circumstances					
8.	I am more effective in dealing with difficult people and situations more effectively					
9.	I tackle the management of my team more effectively					
10	I am more confident in my ability to lead change					

<i>Please indicate your level of agreement with each of the following statements.</i>		Strongly Agree	Agree	Disagree	Strongly Disagree	Too early to say
11	The provision of coaching demonstrates to me that this Organisation cares about my development.					
12	I believe that the coaching I have received has had a direct beneficial impact upon the business/work in my area.					
13	My motivation has increased as a result of the coaching.					
14	My coaching has helped me sort out personal issues which may otherwise have affected my performance at work.					
15	I am more likely to stay with the Organisation as a result of receiving coaching.					
16	It would not be difficult for me to demonstrate how coaching has improved my personal					

<i>Please indicate your level of agreement with each of the following statements.</i>		Strongly Agree	Agree	Disagree	Strongly Disagree	Too early to say
	performance at work.					
17	My coaching has directly resulted in benefits to my Organisation.					
18	My coaching has indirectly resulted in benefits to my Organisation.					

19. Is there any other information that you think future coaches might benefit from knowing in advance about how coaching works?

**Thank you for completing this questionnaire. It will help us greatly in evaluating the Coaching programme and in providing feedback to your coach.**

**References:**

Carter A. (2006) 'Practical Methods for Evaluating Coaching'. Institute for Employment Studies Report 430. Great Britain

Association for Coaching ( 2004) Guidelines for Coaching in Organisations

## Appendix 5 Supervision

The following is a list of standard questions the supervisor may use, based upon Miles & Downey. The Coaching supervision within ABMU will be a non-directive in style.

Purpose:

- To ensure the best interests of the coachee and the organisation are protected
- To provide educative and restorative support to the supervisee

The person answering the questions will be asked to think about a face to face relationship with a client which they may find challenging

Focus on the supervisee

- Tell me what you would like to achieve in this session?
- Tell me what your expectations are regarding confidentiality?

Focus on the coaching practice

- Tell me what coaching you are engaged in at the moment – formal, informal, team, individual?
- Tell me any concerns you have about your coaching work?
- Tell me any concerns you may have had over the last 6 months?

Focus on a Case

- Tell me which coaching relationship/case that you would most like to focus on?
- Tell me what I need to know about that?
- Tell me about the contract you have with the coachee (i.e. goals, ground rules. Expectations, Type of coaching style?)
- What do you find most difficult about this case?
- What do you feel about the coachee?
- What do you think about the coachee?
- What do I need to know about the relationship between you and the coachee?
- What are your principal strategies in working with this coachee?
- How are you delivering value to the organisation?

Focus on the coach – follow-up

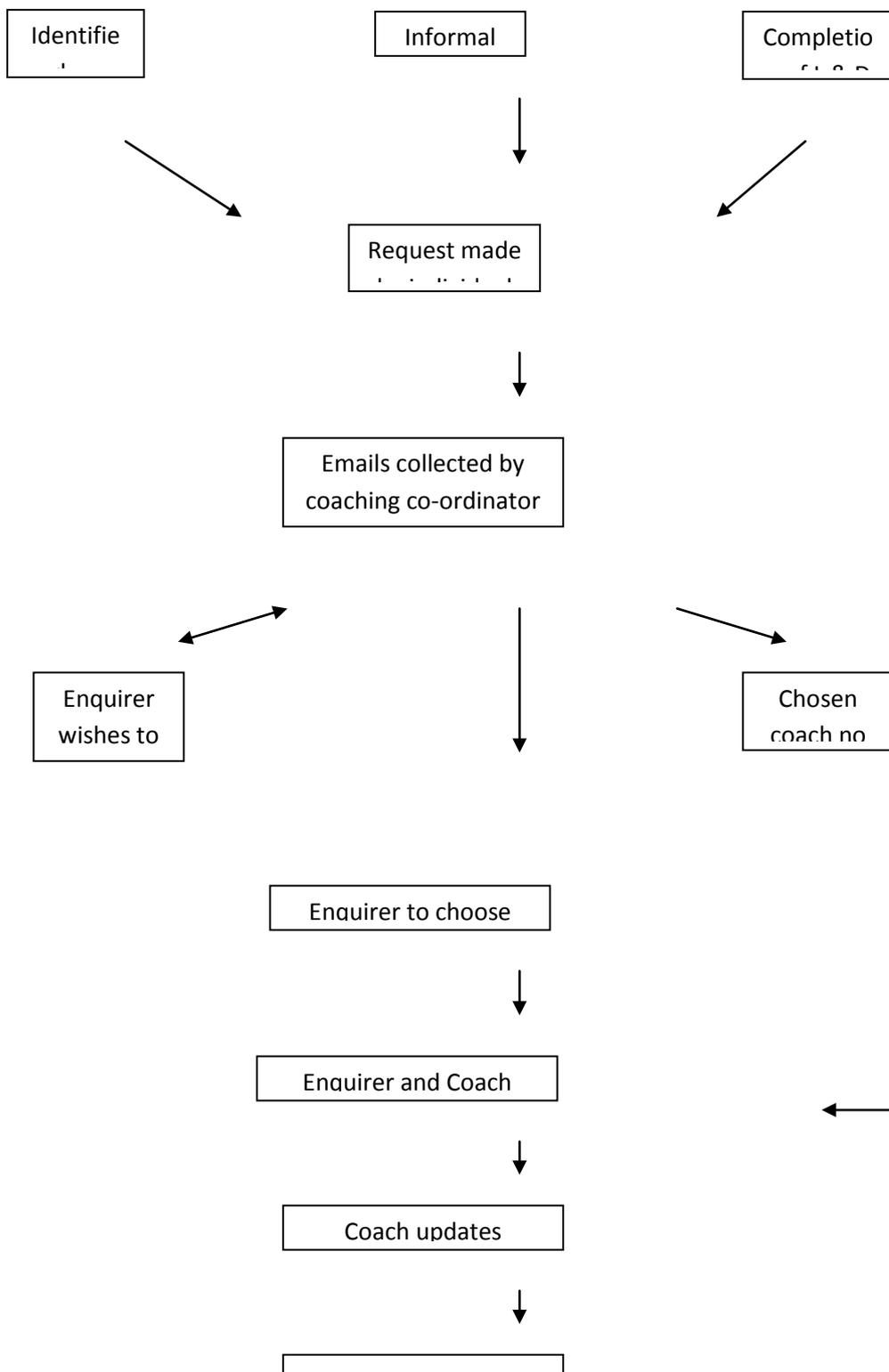
- As a result of this session, what do you need to do for the coachee?
- As a result of this evaluative session, what do you need to do for yourself?
- Is anything happening in your life, you think might be relevant to this session?
- As a result of this session, what do you need to do for the organisation?
- As a result of this session, what are you going to do next?

#### Completion

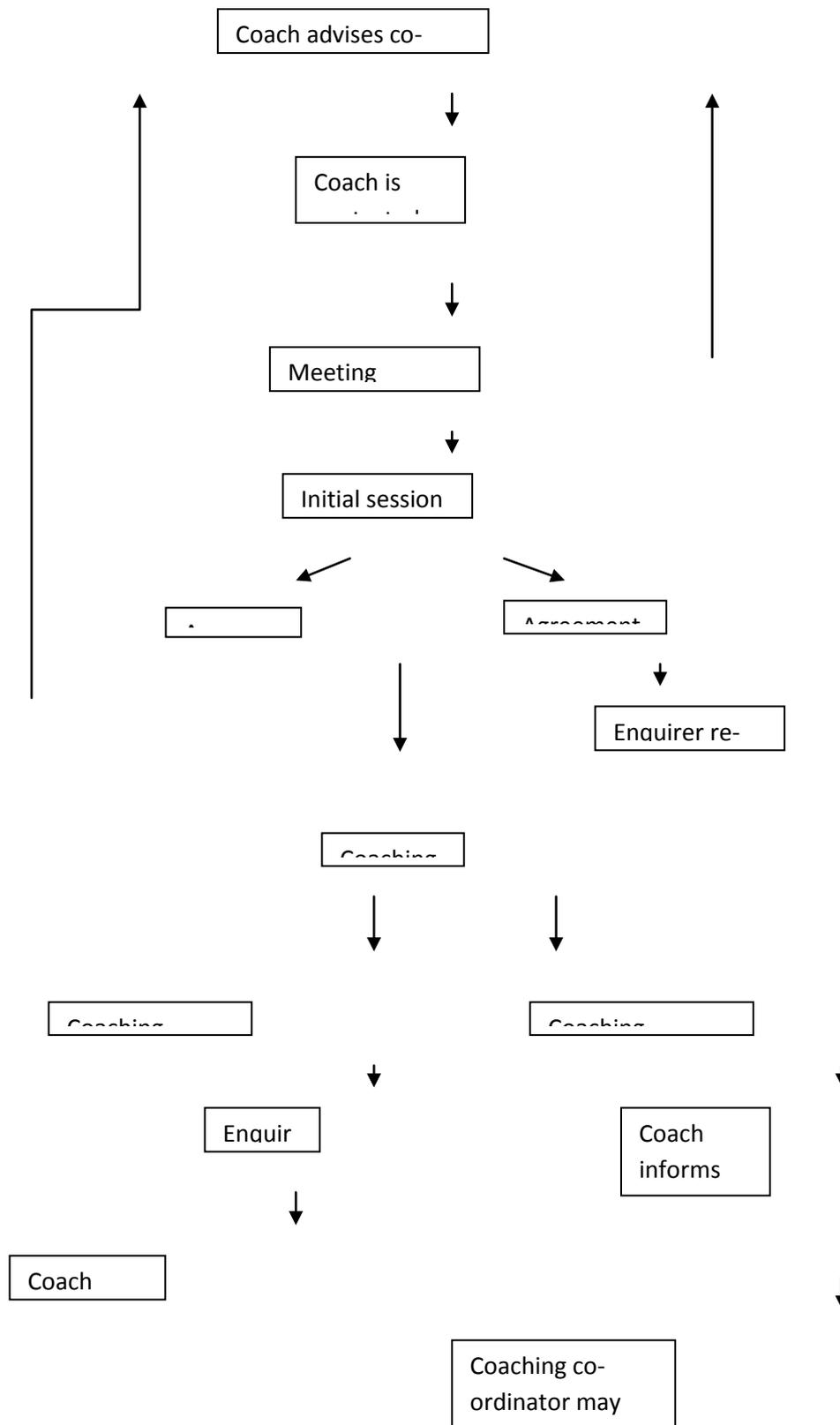
- Tell me in what way I might have influenced or been directive in this session?
- How could I have been a more effective supervisor?

Other questions from the seven –eyed Model can also be interspersed as required

## Appendix 6 Accessing a Coach in ABMU Health Board



## Appendix 7 Coaching Process in ABMU Health Board



## Appendix 8 Becoming a Coach in ABMU Health Board

