

COACHING 101

“How do I enable others to find purpose in the face of challenge?”



ACKNOWLEDGEMENTS

We welcome your suggestions for improving this guide further for future trainings. We also welcome you to use it and adapt it for your own trainings, subject to the restrictions below.

The coaching framework is from the work of Ruth Wageman and Richard Hackman, and the full framework can be found in Wageman, 2010 "Toward a framework for coaching" Working Paper, Harvard University, and in Hackman and Wageman, (2005). "Toward a theory of team coaching," Academy of Management Review, 30, 269-287. Adapted here by Hope Wood, New Organizing Institute.

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COACHING: FROM EXTERNAL CONTROL TO GROWTH

OBJECTIVES:

By the end of this training, you will...

- Learn a simple diagnostic framework and a 5-step process for coaching others in organizing efforts
- Practice the coaching process through role-plays and reflective discussion
- Learn to build a culture of coaching into your team

Why is coaching an important organizing practice?

Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching, put simply, is the act of enabling others.

Organizing campaigns are rich with challenges and learning opportunities, but sometimes we are fish in our own water and we cannot see the challenges we are swimming in. Coaching in organizing helps to alleviate this problem. Coaching helps individuals to overcome motivational, strategic, and informational challenges that might otherwise hinder the progress of the individual, and or the team, and thus the campaign or training.

What is coaching in organizing?

Coaching is a direct intervention in an individual or team's work process to help them improve their effectiveness.

Coaching is a leadership practice that is useful in a variety of contexts in organizing campaigns. Some examples of when coaching skills are necessary:

- Preparing leaders to get over the anxiety that most of us feel when we ask other adults to do tasks that might not be enjoyable.
- Facilitating the goal setting of a leadership team struggling with common understanding of the goals
- Debriefing with a leader who has not kept a commitment
- Helping a leader overcome motivational challenges with managing volunteer teams in the field
- Assisting a leadership team in creating strategy for their organizing campaign

Coaching is useful whenever we are working to enable others to build their own capacity to act, and though the contexts vary, the process is very similar throughout.

Effective Coaching Is	Effective Coaching Is Not
-Showing up and being present to another person's experience and listening, with both your head and heart	- Being so prepared that you figure out all the answers for the coaches before you even hear or observe their challenges
- Helping the coaches explore and make sense of their challenges and successes and what they learned from it all	- False praising of the coaches or only focusing on their strengths because you do not want not to hurt their feelings
- Helping the coaches to find solutions to challenges	- Solely criticizing the coaches for their weaknesses
- Asking questions that both support and challenge the person you are coaching.	- Telling the coaches what to do

How do I practice coaching in organizing?

Good coaching requires learning how to identify a person's or team's strengths and weaknesses in order to find ways to help them mobilize their strengths to overcome their weaknesses. People often know what they "should" do, but a fresh set of eyes is helpful in diagnosing the specific challenges they're facing and initiating a brainstorm of solutions to maneuver through them. There are three basic practices of coaching:

Basic Practices of Coaching:

- **Motivational (heart) coaching** is aimed at enhancing *effort*.
- **Strategic (head) coaching** is aimed at helping the team or individual plan, evaluate, or think about its *strategic or structural approach*.
- **Skills-based (hands) coaching** is aimed at helping the team or individual *execute with skill* (and learn from execution).

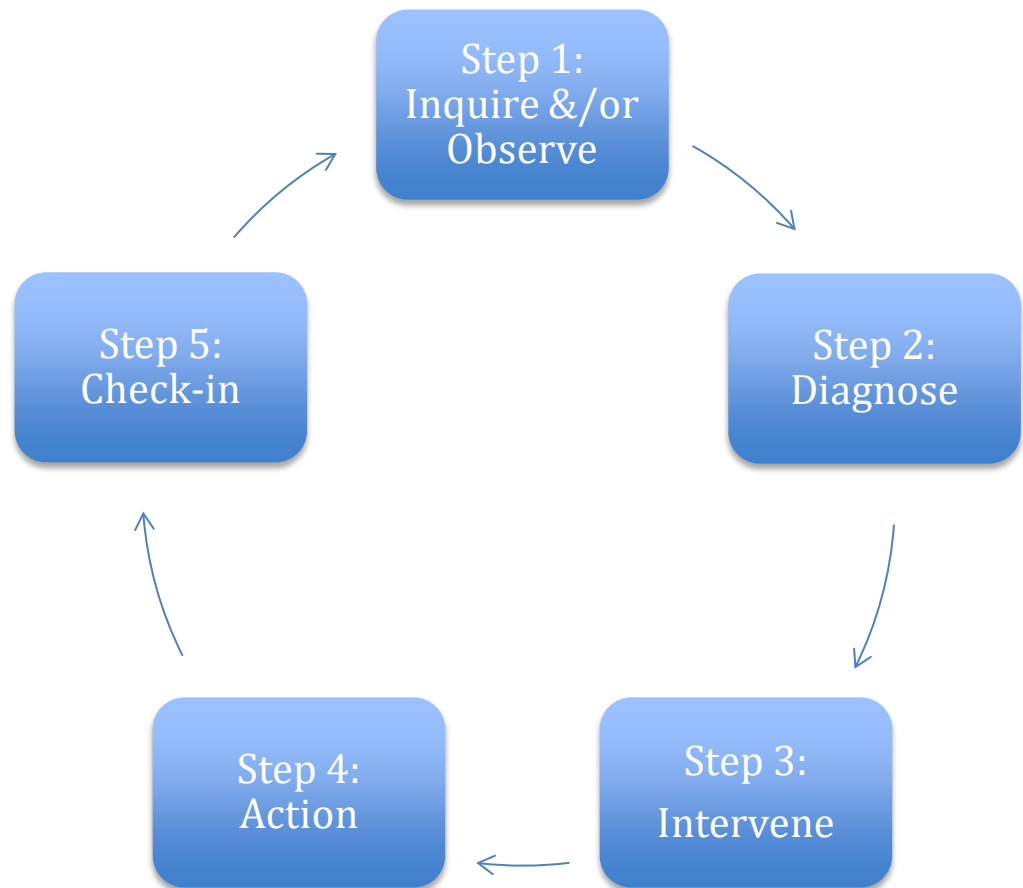
The first part of effective coaching is diagnosing which coaching practice is most needed in any given moment. For example, if an organizer is struggling with strategy but you try using motivational coaching, it is likely to frustrate them further.

As is true for the other practices of leadership, coaching is a practice that only gets honed by DOING, and then reflecting on what works and what doesn't.

Adapted from the working paper 'Toward a Framework for Coaching,' by Ruth Wageman at Harvard University
Modified by Hope Wood at the New Organizing Institute

Following this simple, 5 step coaching process can help you dive in and begin your coaching practice:

5 Step Coaching Process



1. Inquire &/or Observe - What do I see and hear?

When you are observing a person's actions in the field or someone comes to you for help, your first inclination may be to draw conclusions from the initial observations you make. As a coach, you need to take time to dig deeper. Are you seeing all the angles here? What information is missing? Think about the "who, what, why, how, where, when" questions.

- **Motivational (heart):** Is the individual struggling because s/he is not putting forth enough effort? Is she not trying hard enough because she's embarrassed? Is he quitting too soon because of frustration or fear?
- **Strategic (head):** Is the individual struggling because the goals are not achievable? Or because they're not thinking creatively enough about how to use the resources they have to meet goals? Or because the overall strategy doesn't make sense and needs to be clarified or adapted to their situation?
- **Skills-based (hands):** Is the individual struggling because of not being able to muster the behavioral skill to execute effectively? Does he not have the skill in his repertoire? Is he getting interference from other habits and behaviors (like someone well-versed in marketing speak may think that skill set is a substitute for authentic story-telling skills)? Is there something you could model, or that this person that just needs more help practicing and debriefing?

2. Diagnose & 3. Intervene: Which form of coaching does this require? How will I intervene?

		
If your diagnosis is that the individual needs to put in more intense effort, choose a <i>motivational</i> intervention, – for example:	If your diagnosis is that the individual is not <i>understanding</i> the focal practice adequately, or thinking about it appropriately, choose a <i>strategic</i> intervention – for example:	If your diagnosis is that the individual lacks <i>execution skill</i>, choose an <i>educational</i> intervention – for example:
○ Encouragement and enthusiasm—you can do it! ○ Helping the individual understand and confront fear, embarrassment, or other emotions that get in the way of the willingness to try harder or persist in the face of setback ○ Incentivizing, rewarding and praising courage ○ Modeling courage and emotional maturity in your own behavior, confessing fear and explaining how you move toward it rather than away ○ Kick in the pants (offered with love) ○ What else?	○ Asking good questions about how the individual is thinking about the key leadership practice – “Why did you choose to do this and not that?” – Based on where you are now what resources could you draw on to take this story/team/strategy to the next level? ○ Offering your assertions about what you are observing and how you think the individual might fruitfully think about the practice differently – “When you stop at that angry point in the story, I think you may be forgetting that your listeners need a reason to hope in order to be called to action.” ○ Offering the opportunity for silent reflection and self-diagnosis – “Why don’t you take a moment to think through what you believe is working and not working and let’s talk about that?”	○ Model the behavior and invite the coaches to imitate you or work side by side with you to get the “feel” of the activity ○ Break it down into smaller parts and invite the individual to try one at a time ○ Practice, feedback, repeat ○ Offer three or four different practice exercises and observe which ones “take” for that person ○ Repetition, repetition, repetition ○ What else?

4. Action: How can I allow the coaches to develop their leadership skills? What action will they take that would allow them to move forward?

- Avoid the urge to do it for them.
- Allow the coaches to try the intervention.
- Observe them in action and note observations for your debrief.

5. Check-in and Debrief: What do I ask the coaches to help them reflect on their experience?

- What went well?
- What are you challenged by?
- What are some possible solutions?
- What are your goals/next steps?
- Schedule periodic check-ins to support your coaches in integrating this new or revised solution into their regular practice.
- Find out from the coaches how the situation has changed.
- Assess whether the diagnosis and intervention was successful. Celebrate success!

WORKSHEET:

REFLECT ON COACHING

How does this way of COACHING compare with other types of COACHING you have experienced?

What is most challenging and most new or interesting about this way of supporting others' development?

How could this type of coaching be used to help you support other organizers (volunteer and staff) out in the field? What are some of the practices that you will use next time you work with another organizer?

Coaching Cycle Scenarios – For Use with Coaching 101 Package

Below are 4 scenarios, you have been provided enough information for **Step 1: Inquire and/or Observe - What do I see and hear?** of the coaching cycle – and you are free to use a little imagination to round out the scenario. Your task is to determine what kind of coaching they need – **Motivational, Strategic, Skills-based.**

Scenario 1: The context – You are preparing leaders to get over the anxiety that most of us feel when we ask other adults to do tasks that might not be enjoyable.

This is a group of local leaders that have secured member volunteers to run a phone bank asking for campaign contributions for a school board candidate's campaign. The leaders are scared of hearing no's from their colleagues on the phones and are a little by the growing "clarifying questions" coming from their volunteers. Ultimately, they feel they should just scrap the whole thing because they are not confident that the volunteers will show up and they are sure they won't raise much money.

Type of Coaching: _____

Scenario 2: The context – You are facilitating the goal setting of a leadership team struggling with common understanding of what their campaign should be able to achieve.

The team members have a wildly divergent notions of what the outcomes should be and they keep shying away from setting a goal and straying into thinking about "cool" actions they could plan. It appears to you that they may not have run this kind of meeting before and they may not understand how to develop a plan for action.

Type of Coaching: _____

Scenario 3: The context – You are debriefing with a leader who has not kept a commitment.

The leader is relatively new and quite a bit younger than others at the worksite – but has good relationships and is well respected. The commitment was a relatively small one that was dependent on using already established relationships – a.k.a. "ask five friends to..." You get the sense that this leader has not taken this commitment seriously at all.

Type of Coaching: _____

Scenario 4: The context - Helping a leader overcome motivational challenges with managing other members across several worksites who are supposed to be making a face to face contact with each employee in the worksite to update contact information and establish a basic presence in each worksite.

The leader is having difficulty keeping the teams to following the protocol of relationship building – various teams are reverting to – "place a notice in the mailbox" – send a broadcast email – or are leaving it to one person at the worksite to do alone – or are not doing it at all. The leader has been shy to redirect the teams to the protocol of face to face contact and feels that it is "not their place" to question if other adults have kept up their end of the work.

Type of Coaching: _____

The Consultancy Coaching Protocol

15 mins	What	How
	Opening by Lead Facilitator	<i>Facilitator reviews protocol and adjusts time as desired by presenter or as fits the group. The group may decide to spend more time on the preparation section, or in the discussion. Timing also depends on how many are in the group.</i>
5	Presenter Shares	1. <i>Presenter shares the dilemma—this can be verbally shared or presenter can offer a written document. If a written description is shared, presenter can also verbally add anything he'd like before or after the group reads the document. It's appropriate for the group members to take notes about what they're hearing. Presenter might also share an artifact such as a transcript of a coaching conversation, an email, a plan for a conversation, etc.</i> 2. <i>Presenter can ask for feedback or input in one area or around one key question. Asking for specific feedback or support can help a discussion stay focused and useful.</i>
3	Clarifying Questions NOT Probing	<i>Group asks presenter clarifying questions. Clarifying questions are yes/no or require very short answers.</i> <i>The facilitator needs to interrupt if probing questions are asked and can remind the group that probing questions can be raised during the discussion.</i>
5	Group Fishbowl Discussion	1. <i>Presenter moves his/her chair outside of the circle and can take notes if desired.</i> 2. <i>The presenter can remind the group of the presenter's key question.</i> 3. <i>Group members can raise probing questions, share the insights they gained, and share any other comments or reflections they came up with. The facilitator can open this section by suggesting that each group member briefly (in about one minute) share his/her initial thoughts on the dilemma and the group can whip around so that all can share a thought before opening into a less structured discussion.</i> 4. <i>Group needs to ensure that discussion stays focused on the presenter's dilemma and if requested, on his/her key question. Group may also take actions to ensure equity of participation.</i>
2	Closing	<i>Presenter shares any reactions, insights, feelings about protocol or what was said; he/she doesn't need to respond to questions that were raised in the group discussion. If time permits, group can share reflections on process.</i>

General Coaching Sentence Stems

Active Listening Stems	Nonjudgmental Responses
• So... • In other words... • What I'm hearing, then... Is that correct? • What I hear you saying is... Am I missing anything? • I'm hearing many things... • As I listen to you, I'm hearing... Is there anything else you feel I should know?	• I noticed how when you...the students really... (to identify something that worked and why it worked) • I'm interested in learning (or hearing) more about... • I'd love to hear more about... • Thank you for sharing your thoughts. Can you tell me more about...?
Clarifying Stems	Probing Stems
• Let me see if I understand... • I'd be interested in hearing more about... • It would help me understand if you'd give me an example of... • So, are you saying/suggesting...? • Tell me what you mean when you... • Tell me how that idea is like (or different from)... • To what extent is...? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...	• What's another way you might...? • What would it look like if...? • What do you think would happen if...? • How was...different from (or similar to)...? • What's another way you might...? • What sort of an impact do you think...? • What criteria do you use to...? • When have you done something like...before? • What do you think...? • How did you decide...(come to that conclusion?)? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...



Facilitative & Directive Coaching Stems*

FACILITATIVE	DIRECTIVE
Cathartic Stems - I'm noticing that you're experiencing some feelings. Would it be OK to explore those for a few minutes? - What's coming up for you right now? Would you like to talk about your feelings? - Wow. I imagine I'd have some emotions if that happened to me. Are you experiencing strong feelings?	Informative Stems - There's a useful book on that topic by... - An effective strategy to teach ____ is... - You can contact ____ in ____ department for that resource... - Your principal will be in touch about that. _____ is very effective at teaching that skill; maybe you could observe him.
Catalytic Stems - Tell me about a previous time when you... How did you deal with that? - I hear you're really struggling with... How do you intend to start? - It sounds like you're unsatisfied with... What would you do differently next time? - You've just talked about five different things you want to work on this week. The last thing you mentioned is... How important is this to you? - How do you want your students (or a particular student) to remember you? - How do you want to remember this time or situation in fifteen years? - Who do you want to be in this situation?	Prescriptive Stems - I would like you to discuss this issue with your supervisor. - You need to know that the school's policy is... - Have you talked to ____ about that yet? Last week you said you planned on doing so. - Would it be ok if I share some advice that I think might help you? You're welcome to take it or leave it, of course. - I'd like to suggest...
Supportive Stems - I noticed how when you...the students really... (To identify something that worked and why it worked) - It sounds like you have a number of ideas to try out! It'll be exciting to see which works best for you! - What did you do to make the lesson so successful? - I'm interested in learning (or hearing) more about... - Your commitment is really inspiring to me. - It sounds like you handled that in a very confident way. - You did a great job when you... - I'm confident that you'll be successful.	Confrontational (Interrupting) Stems - Would you be willing to explore your reasoning (or assumptions) about this? - I'd like to ask you about... Is that okay? - What's another way you might...? - What would it look like if...? Is there any other way to see this situation? - What do you think would happen if...? - What sort of an effect do you think...would have? - I'm noticing (some aspect of your behavior)...What do you think is going on? - What criteria do you use to...? - Who do you want to be in this situation? How do you want to show up? - How do you want others to see you in this situation?

* The labels for these categories—cathartic, catalytic, supportive, informative, directive, confrontational—are from the work of John Heron.

