

COACHING COMPETENCIES

FOR

APPRECIATIVE COACHING

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2006



Clergy Leadership Institute _____

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TABLE OF CONTENTS

Transformational Coaching Competencies 3
Coaching Fractal: Joining, Working, Co-Creating Outcomes 3
Rating System for Competencies 4
Joining Competencies 5
Working Competencies 6
Co-Creating Outcomes Competencies 9
Coaching Competency Feedback Form 11

Note: Not all the competencies listed in this section would be required in each session. While some competencies could be considered essential in all sessions others may depend on the particular needs of the Client and the strategies being used.

APPRECIATIVE COACHING COMPETENCIES

- Transactional Coaching** A transaction between coach and client whereby the client acquires ideas, and techniques for the incremental improvement in skills and competencies.
- Transformational Coaching** Creating a context for the client to transform their sense of themselves and how they view the world they live and work in. Beyond "skill" development to "human" development.

COACHING FRACTAL: JOINING, WORKING, CO-CREATING OUTCOMES

- Joining** The overall goal of the joining phase is to establish a respectful, coaching relationship in which the coach joins the client in the client's world so that they can journey to together to the Client's goal.

Joining is incarnational. It is about establishing rapport with the client that enables the coach to work "with" the client rather than do "to" the client. Doing "to" the client will result in the client not feeling understood and they will perceive any intervention by the coach as an act of violence which they will resist. Most of what is considered as resistance is an indication of a failure to join the client.

- Working** *Establishing Goals, Clarifying Values
Discovering Resources, Imagining Outcomes*

From the mutual understanding created in the joining phase, working is the clarification of the client's goals in the light of their values followed by the identification of resources to ensure goal accomplishment. The focus of the work may be on identifying and developing specific performance skills or resolving motivational issues that prevent the application of skills.

- Co-Creating Outcomes** Co-Creating Outcomes overlaps much of the Working phase. As the coaching relationship unfolds more time will be spent in this phase. The important task in this phase is to ensure that once adequate resources have been identified and associated to the achievement of the Client's goals, that the Client follows through with the strategies, and successful behaviors are reinforced so that they are ecological and habituated. When a desired outcome is not achieved Competent Coaches spend little time on "Why" the outcome was not achieved but rather they seek to discover the additional resources the Client will need to successfully achieve their goal.

RATING SYSTEM FOR COMPETENCIES

This rating scale for assessing competencies is based intuitively on the idea that all human characteristics are normally distributed so that the majority of people's ability on a specific competency will be in the average range. However we can also set a threshold of acceptable necessary behavior for effective coaching regardless of the distribution.

All Coaching Competencies are assessed with respect to the following 5 point scale.

1 Poor 10% Negative	2 Weak 20%	3 Acceptable 40% Average	4 Good 20%	5 Excellent 10% Positive
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- 1: Poor:** The Coach's performance on this factor is either totally lacking or well below that required for effective coaching.
 About 10% of coaches would fall in this category.
 Clients would complain bitterly about this level of performance.
- 2: Weak:** The Coach possesses this factor to some degree but at a level below that required for effective coaching.
 About 20% of coaches would stumble in this category.
 Clients would grumble about this level of performance.
- 3: Acceptable:** The Coach's performance on this factor is adequate or at a level just sufficient for effective coaching.
 About 40% of coaches would walk in this category.
 Clients would accept but not be inspired by this level of performance.
- 4: Good:** The Coach's performance on this factor is clearly above the minimum required for effective coaching.
 About 20% of coaches would run in this category.
 Clients would be appreciative for this level of performance.
- 5: Excellent:** The Coach's performance on this factor is out standing and is of extremely high quality. Coaching at this level is likely to result in clients experiencing transformation rather than simple transactional learning.
 About 10% of coach would excel in this category.
 Clients would be transformed by this level of performance.

JOINING COMPETENCIES

Criteria J1. Showing Up: Did the Coach show up for the session? We cannot join with a client if we don't show up or if we remain attached in our minds to other people places and things. Sometimes we may physically show up but not be really be present. Other times we may send a parody of ourselves or how we want to be perceived.

1	2	3	4	5
<p>Poor: Coach preoccupied and distracted by other thoughts or stimuli. Weak: Coach appears present but is easily distracted, interjects comments about their own unresolved struggles. Has affectation or is "trying" to be or sound like a coach.</p>		<p>Acceptable: Coach is genuine and present to the client. Coach responds to Client</p>	<p>Good: Coach's shows up and enters into the world of the client. Excellent: Coach and Client have shared experience of genuinely being together at work on the Client's issues.</p>	

Criteria J2. Acceptance and Respect. Coach creates a "space" of acceptance and respect for the client to work in. Since alienation is a core problem effective coaching requires a relationship of acceptance and respect

1	2	3	4	5
<p>Poor: Coach is critical, indifferent, uninterested, judgmental, cynical, contemptuous. Weak: Coach only responds to some of the Client's experience while "running" from other parts.</p>		<p>Acceptable: Coach is able to listen and receive both positive and negative experience but responds in a disproportionate way to either experience.</p>	<p>Good: Coach is able to receive and accept both positive and negative positions or emotions. Excellent: Client experiences transformation in the presence of radical respect.</p>	

Criteria J3. Active Listening: Accurate reflection of the content of the client's presentation.

1	2	3	4	5
<p>Poor: No indication that the coach has heard the client. Coach continues to ask questions without reflection or verifying understanding Weak: Inaccurate reflection without clarifying understanding. Becomes argumentative over content.</p>		<p>Acceptable: Coach is able to clarify and accurately reflect content. Client has a general sense of "being heard."</p>	<p>Good: Coach accurately summarizes, reflects, clarifies contents in ways that add to client's understanding. Excellent: Coach and Client have shared experience of the content that goes beyond the client's basic presentation.</p>	

Criteria J4. Empathetic Listening: Accurate reflection of the client's emotional state.

1	2	3	4	5
<p>Poor: No indication that the coach knows what the client is feeling. Coach continues to ask questions without reflection or verifying understanding Weak: Inaccurate reflection of feelings without clarification. Becomes argumentative over feelings.</p>		<p>Acceptable: Coach is able to clarify and accurately reflect feelings. Client has a general sense that coach knows what they are feeling.</p>	<p>Good: Coach accurately identifies and reflects feelings in ways that add to client's understanding. Coach modulates affect to match client. Excellent: Coach and Client have connected at the feeling level beyond the client's initial presentation.</p>	

Criteria J5. Representational System. Coach identifies and responds congruently within the client's representational system (visual, auditory, kinesthetic, modalities.)

1	2	3	4	5
<p>Poor: No indication that the coach is aware of or responding to client's representational system. Coach is stuck in only one modality. Weak: Mismatched or incongruent reflection.</p>		<p>Acceptable: Coach is able to clarify and accurately reflect feelings and content in the modality presented. Client has a general sense that coach knows what they are feeling.</p>	<p>Good: Coach accurately matches modalities including non-verbal expressions such as gestures. Excellent: Coach and Client have congruently connected by the Coach matching and pacing the Client.</p>	

Criteria J6. Setting the Agenda.

1	2	3	4	5
<p>Poor: Coach violates Client's integrity by imposing their agenda. Weak: Coach sets the agenda with out regard to the Client's purpose. Coach engages Client's agenda but violates their own integrity in doing so.</p>		<p>Acceptable: Coach and Client negotiate an agenda that serves the Client's purpose and that the Coach can willingly engage in.</p>	<p>Good: Coach and Client create an agenda that goes beyond Client's initial expectations. Excellent: Coach and Client tap into an agenda that seems greater than either.</p>	

WORKING COMPETENCIES

Criteria W1: Goal Formation and Clarification. Client and Coach establish and where necessary renegotiate a compelling positive goal in the light of the Client's values.

1	2	3	4	5
<p>Poor: Coach never establishes goal. Coach demands goal that client doesn't agree with. Goal is negatively stated. Weak: Poorly defined goal, that results in aimless coaching. Client wants goal that coach cannot agree with.</p>		<p>Acceptable: Positive goal is established but with only minimal exploration of implications of goal attainment. Commitment to goal is adequate but not compelling</p>	<p>Good: Positive goal is established and is appropriately renegotiated in light of values and changing circumstances. Excellent: Goal is integrated with values and directs the Coaching in a compelling manner.</p>	

Criteria W2: Values Identification and Clarification. Client and Coach identify and clarify the Clients values as they relate to the Client's goal.

1	2	3	4	5
<p>Poor: No identification of values Weak: Vague understanding of why goal attainment would enhance Client's values or life.</p>		<p>Acceptable: Values are explored and identified. Goals are consistent with values but do not necessarily motivate effort.</p>	<p>Good: Values are integrated with Goals and mobilize Client's efforts. Excellent: Client has deeper sense of their inherent values located within a framework of universal values.</p>	

Criteria W3: Resource Identification: Coach assists Client to identify attainable resources that will enable Client to achieve their goal

1	2	3	4	5
<p>Poor: No exploration of what the Client needs to accomplish their goal. Weak: Client can describe the necessary resources but has no idea how to access them.</p>		<p>Acceptable: Resources for success are identified and viewed as accessible.</p>	<p>Good: Resources are identified and Client can imagine their successful application. Excellent: Client has new awareness of their resources.</p>	

Criteria W4: Seeking and Satisfying Objections: Objections are the Client's internal objections (sometimes referred to as resistance) to accomplishing the goal. These need to be satisfied rather than overcome. Overcome objections is an act of violence and will result in self-sabotage and other forms of resistance. Before initiating any change effective coaches elicit objections and seek to satisfy them.

1	2	3	4	5
<p>Poor: Coach violates Client's integrity by demanding pursuit of goal. Weak: Coach ignores Client's objection or ambivalence to pursuing goal.</p>		<p>Acceptable: Client identifies and satisfies specific objections.</p>	<p>Good: Creative satisfaction of objections increases Client's self- acceptance Excellent: Client's capacity to seek and satisfy objections generalizes to other areas of their life and work.</p>	

Criteria W5: Empowering the Client. Effective Coaches empower their Client's rather than dictate goals and assume responsibility for the Client's outcomes.

1	2	3	4	5
<p>Poor: Coach is dictatorial and domineering of Client. Weak: Coach assumes responsibility for successful outcome, by providing all the answers or creates dependency. Coach robs Client of their autonomy and personal creativity.</p>		<p>Acceptable: Coach elicits Client's thoughts and ideas.</p>	<p>Good: Coach acts as thinking partner that empowers Client to seek and rely on their own initiative and experience. Excellent: Coach empowers Client to fully experience their creativity beyond what the Client initially thought possible.</p>	

Criteria W6: Use of Questions. Questions can either open a gate to joining and creative thinking or can become adversarial and be experienced by the Client as an emotional or judgmental pummeling.

1	2	3	4	5
<p>Poor: Client pummeled by questions. Adversarial and blaming quality to questions. Intrusive questions that satisfy Coach's purulent curiosity. Weak: Yes/No questions that don't encourage exploration of the Client's uniqueness. "Why" questions that promote theorizing rather than exploration of resources.</p>		<p>Acceptable: Coach balances questions with reflections. Questions provide mutually beneficial information for Client and Coach.</p>	<p>Good: Socratic curiosity. Questions that evoke wonder and possibility in Client. Excellent: Questions lead Client into new areas of self-generated understanding.</p>	

Criteria W7: Challenging the Way. Effective coaches creatively question clients to discover what is possible. They never settle for the Client's *Status Quo*, nor their negative belief system of why things are impossible, nor do they impose endless challenges that are perceived as relentless criticism.

1	2	3	4	5
<p>Poor: Coach provides no challenge to Client's perspective. Coach overly challenges, evoking resistance shutting Client down. Challenge is blaming which leads to defensiveness Weak: Coach focuses on why things are impossible, rather than on how things could be. Coach simply accepts client's perspective.</p>		<p>Acceptable: Coach appropriately creates environment for Client to explore alternatives.</p>	<p>Good: Coach opens Client to new possibilities, that engage Clients imagination and action. Excellent: The Client is stretched into new zone of excellence beyond what they initially thought possible.</p>	

Criteria W8: Compassionate Flexibility: Effective Coaches have the ability to flexibly use the three archetypal energies of compassion: Tenderness, Fierceness, and Playfulness. In general effective coaches are tender in the face of pain, fierce in the face of injustice, and playful in the face of resistance.

<p>1</p> <p>Poor: Coach presents only one "face" or response to client.</p> <p>Weak: Coach is inappropriately, tender, fierce, or playful, in a manner that evokes resistance or is damaging to the Coaching relationship.</p>	<p>2</p>	<p>3</p> <p>Acceptable: Coach can move appropriately between two of the energies in response to the clients presentation.</p>	<p>4</p> <p>Good: Coach has full range of movement, they can be appropriately tender, fierce or determined, and playfully tease and use humor to illicit new understanding</p> <p>Excellent: Coach's compassionate expression allows Client to see themselves in a new light.</p>	<p>5</p>
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Criteria W9: Uses the Client's Spiritual Resources: Effective Coaches help their client's use their faith and spiritual resources in the pursuit of their goals. This does not mean that the Coach has to share the same belief system or impose a belief system, but that the coach can respectfully discover and use the Client's spiritual resources.

<p>1</p> <p>Poor: Coach denigrates or demeans the Clients faith practices. Coach imposes the Coach's faith practices on the Client.</p> <p>Weak: Coach ignores the Client's spiritual practice as potential resources for the Client.</p>	<p>2</p>	<p>3</p> <p>Acceptable: Coach can move appropriately between two of the energies in response to the clients presentation.</p>	<p>4</p> <p>Good: Coach has full range of movement, they can be appropriately tender, fierce or determined, and playfully tease and use humor to illicit new understanding</p> <p>Excellent: Coach's compassionate expression allows Client to see themselves in a new light.</p>	<p>5</p>
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Criteria W9: Use of Assessments. Effective Coaches may use a variety of structured and unstructured assessments to assist the Client's self-understanding.

<p>1</p> <p>Poor: Inappropriate use of assessments. Reliance on invalid and/or unreliable assessment instruments.</p> <p>Weak: Coach uses assessments to put Client in a box or excuse behavior. Coach relies on assessment reports without explaining or verifying results.</p>	<p>2</p>	<p>3</p> <p>Acceptable: Coach uses appropriate assessments but may rely heavily on automated reports rather than assist Client to become aware of their own uniqueness.</p>	<p>4</p> <p>Good: Coach verifies and integrates a variety of assessments to assist Client in their self-understanding and in the pursuit of their goals.</p> <p>Excellent: Client is able to use the assessments independently, to grow in self-acceptance, to fully appreciate their own uniqueness, the uniqueness of others and their commonalities.</p>	<p>5</p>
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CO-CREATING OUTCOMES COMPETENCIES

Criteria C1: Imagining the Successful Outcome. A Client cannot do what they cannot imagine. Effective Coaching requires that the Coach ensures that the Client can imagine achieving their outcome.

<p>1</p> <p>Poor: Client cannot imagine successful outcome. Weak: Client hopes for successful outcome but does not engage in any significant imagination that might identify obstacles.</p>	<p>2</p>	<p>3</p> <p>Acceptable: Client is able to imagine to imagine achieving the outcome in at least one modality and imagine obstacles and solutions that might arise.</p>	<p>4</p>	<p>5</p> <p>Good: Client imagines outcome in several modalities, such as visual, auditory, kinesthetic Excellent: Client's imagined success fuels motivation and performance.</p>
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Criteria C2: Identifying External Obstacles and Finding Solutions. Competent Coaches help Client's anticipate goal obstacles and generate potential solutions before they arise.

<p>1</p> <p>Poor: No exploration of obstacles. Weak: Obstacles may be explored but no solution strategies developed.</p>	<p>2</p>	<p>3</p> <p>Acceptable: Potential obstacles are identified and solutions discussed.</p>	<p>4</p>	<p>5</p> <p>Good: Potential obstacles are identified, alternative solutions are explored and rehearsed. Excellent: Client's global sense of resourcefulness is enriched as they apply specific solutions.</p>
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Criteria C4: Reframing. Effective coaches enable clients to see things differently so that they have greater choice and are able to respond creatively to their environment.

<p>1</p> <p>Poor: Negative framing: Client's view of them self and their options is restricted rather than enlarged. Weak: Client's view of coaching issues remains relatively unchanged.</p>	<p>2</p>	<p>3</p> <p>Acceptable: Client is able to view current predicament from a resourceful perspective.</p>	<p>4</p>	<p>5</p> <p>Good: Client's ability to reframe problems to opportunities or resources is generative. Excellent: Client's view of them self and their resources is transformed.</p>
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Criteria C5: Establishing and Maintaining Accountability. Effective coaches establish patterns of internal self-reliance to ensure that the Client develops the habit of successful follow through.

<p>1</p> <p>Poor: No follow-up or accountability. Weak: Method of accountability is imposed on Client, or demotivates Client. Over time Client becomes increasingly reliant on the Coach to ensure follow through.</p>	<p>2</p>	<p>3</p> <p>Acceptable: Coach establishes accountability plan and follows up with Client. Coach can be "counted" on to keep commitments.</p>	<p>4</p>	<p>5</p> <p>Good: Coach elicits Client's accountability needs and develops a plan of follow through. Excellent: Client grows into self-reliance with regard to accountability and follow through.</p>
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Criteria C6: Encouraging the Heart. Competent Coaches discover what encourages and motivates each individual client and uses specific, targeted, encouragement to reinforce successful behaviors.

1	2	3	4	5
<p>Poor: No encouragement is offered. Criticism is discouraging. Weak: Unsolicited solicitude is experienced as trespass. Encouragement is excessive and non-specific or not within Client's values</p>		<p>Acceptable: Coach creates affirming, encouraging coaching context.</p>	<p>Good: Coach matches encouragement to the Client's value system. Excellent: Coach's encouragement is generative force in Client's positive self belief.</p>	

Criteria C7: Sponsoring New Identity. Metaphorically, Competent Coaches see the gold in the Client and hold it until the Client is able to hold and own it for themselves. They sponsor and nurture the formation of new and evolving identity by aligning core purpose with innate strengths. Clients not only gain skills but the way they view themselves is transformed.

Note: From developmental perspective clients are most likely to explore identity and core purpose issues approximately once every 7 years.

1	2	3	4	5
<p>Poor: Coach has no regard or respect, or disrespects the Client as a person. Client's personal creativity is thwarted by Coach's interactions. Weak: Client is viewed simply in terms of what they do, without regard for who they are.</p>		<p>Acceptable: Coach expresses belief in the Client as a person beyond what they simply do.</p>	<p>Good: Client identifies and aligns core purpose with action and has a growing sense of self as unique and gifted. Excellent: Client has profound sense of them self in a new way, that does not negate who they were but builds on the best of who they have been.</p>	

Criteria C8: Commitment to Outcomes. Effective Coaches never lose sight of the desired outcome and flexibly change strategies to achieve coaching goals.

1	2	3	4	5
<p>Poor: Inflexibly persists in strategies that are not working for Client. Weak: Relies on general nonspecific strategies, with minimal attention to specific Client outcome.</p>		<p>Acceptable: Has repertoire of strategies and adapts them to the Client as they move toward their goal.</p>	<p>Good: Coach uses goal to transform coaching strategies. Excellent: Coach invents unique client specific, novel, strategies to ensure goal achievement.</p>	

On the following page is a summary form that is used during the training to assess participant performance.

COACHING COMPETENCY FEEDBACK FORM

Coach's Name: _____ Observer: _____ Date: _____

Area Client Wants Coaching: _____

Joining: Coach joins Client in the Client's world (**State A**) by establishing and maintaining rapport with Client.

<p style="text-align: center;">1 2</p> <p>Poor: Coach violates Client's integrity by being callous, disrespectful, indifferent, judgmental or imposing their own agenda. Weak: Minimal rapport established. Coach never really enters the Client's world, nor uses their language or understands the Client's perspective.</p>	<p style="text-align: center;">3</p> <p>Acceptable: Coach creates respectful coaching environment that allows for rapport. Coach understands the Client's world.</p>	<p style="text-align: center;">4 5</p> <p>Good: Coach has accurate empathy and joins the Client in the Client's world from which they co-create Client's preferred outcome. Excellent: In the light of the Coach's radical respect and acceptance the Client grows in their own self-respect and self-wonder.</p>
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Goal Formation and Clarification: Client and Coach establish a successful outcome for the session and where necessary renegotiate a compelling positive goal (**State B**) that is congruent with the Client's values.

<p style="text-align: center;">1 2</p> <p>Poor: Coach never establishes goal. Coach demands goal that client doesn't agree with. Goal is negatively stated. Weak: Poorly defined goal, that results in aimless coaching. Client wants goal that coach cannot agree with.</p>	<p style="text-align: center;">3</p> <p>Acceptable: Positive goal is established but with only minimal exploration of implications of goal attainment. Commitment to goal is adequate but not compelling.</p>	<p style="text-align: center;">4 5</p> <p>Good: Positive goal is established and is appropriately renegotiated in light of values and changing circumstances. Excellent: Goal is integrated with values and directs the Coaching in a compelling manner.</p>
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Resources: Coach assists Client to explore options and resources that will enable Client to achieve their goal.

<p style="text-align: center;">1 2</p> <p>Poor: No exploration of what the Client needs to accomplish their goal. Weak: Client can describe the necessary resources but has no idea how to access them.</p>	<p style="text-align: center;">3</p> <p>Acceptable: Client's options are explored and resources for success are identified and viewed as accessible.</p>	<p style="text-align: center;">4 5</p> <p>Good: Resources are identified and Client can imagine their successful application. Excellent: Client discovers new options and has greater sense of flexibility and expectation of success.</p>
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Obstacles: Coach helps Client anticipate obstacles and objections and generate solutions before they arise to ensure that desired outcomes are achievable and sustainable.

<p style="text-align: center;">1 2</p> <p>Poor: No exploration of obstacles or objections. Weak: Obstacles may be explored but no solution strategies developed.</p>	<p style="text-align: center;">3</p> <p>Acceptable: Potential obstacles are identified and solutions discussed. Client's personal objections to the goal are also explored</p>	<p style="text-align: center;">4 5</p> <p>Good: Potential obstacles and objections are identified, alternative solutions are explored and rehearsed. Excellent: Client's global sense of resourcefulness is enriched.</p>
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Planned Action: Coach assists Client to establish and maintain commitment to successfully realize their next steps.

<p style="text-align: center;">1 2</p> <p>Poor: No next steps are established. Weak: Next step is poorly established without significant commitment or expectation of successful outcome. Method of accountability is imposed on Client, or demotivates Client.</p>	<p style="text-align: center;">3</p> <p>Acceptable: Next step is established.</p>	<p style="text-align: center;">4 5</p> <p>Good: Client has plan of action that has a measurable outcome to which they are committed to accomplishing. Method of accountability is appropriately established. Excellent: Client feels internally empowered to achieve their next step.</p>
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General Comments: