William James College

Graduate Education in Psychology

# Graduate Certificate in Executive Coaching

# Student Practicum Handbook

*2015-2016*

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# Contents

# Student Overview of the WJC Graduate Executive Coaching Practicum

The executive coaching practicum is an opportunity for you to put into practice all that you've learned in your course work.

You will either find your own client for the practicum or WJC will match you with a leader from a non-profit organization in the greater Boston area. As we have emphasized in all of your program coursework, executive coaching, unlike other forms of coaching, is an organizational intervention. It is important to remember that you are working with your client within the context of his/her organization. The coaching engagement should be designed so that both the client and the organization benefit. Your engagement should have an organizational sponsor, typically the client's boss or a board chair. Your work will include conversations with that person, and in most cases, will include feedback conversations with others in the organization.

The practicum consists of:

- Chemistry Check Meetings with your client and Supervisor
- At least 6 coaching sessions with your client
- At least 1 feedback session
- Assessment related sessions including stakeholder interviews, **in addition** to the 6 coaching sessions
- At least 6 supervision sessions with your assigned supervisor
- Case presentations/peer reviews in the Practicum Class (WIR January 10th, February 7th, March 6th and April 9th)
- A written summary of the feedback and support you received as part of your case presentation

The actual practicum period starts at the beginning of January. However, December is an important month where you hold Chemistry-check meetings with both your Supervisor and client. By mid-January you should have had a contracting conversation with your client and set your goals with your Supervisor. Please keep in mind that you really have a very short coaching period. It's important to keep the process moving.

# Coaching Practicum Schedule and Phases

| Date | Task | Description |
|---|---|---|
| November 2015 | Coaching Client and Supervisor Assigned | You'll be assigned a master-coach supervisor who will serve as your supervisor through the practicum. You will be assigned a client. |
| December 2015 | Chemistry Checks | You should have chemistry check meetings with both your client and Supervisor before the start of the practicum. |
| January 2016 | Conduct initial meeting with client | Talk about:<br>• the roles and expectations you each have,<br>• when and where you'll meet,<br>• confidentiality,<br>• when/how to include the boss/board<br>• what kind of assessment to conduct<br>**Please submit the signed "Limits of Responsibility" contract after this meeting.** |
| January-April | Coaching & Supervision Logs | Complete one of these after each session with your client and/or Supervisor. |
| January 10th | First Weekend in Residence | Discuss initial coaching meetings with clients and Supervisors. Practice stakeholder interviewing and debriefing feedback. |
| January 2016 | Meet with Client's Manager | Have an initial conversation (can be by phone) with your client's boss to understand her/his point of view on the developmental agenda for your client. |
| | Set Contract with Client | Hold your contracting meeting with client. This is the time to finalize the "rules of engagement" with your client and, if possible, his/her boss. **Submit Client Coaching Contract.** |
| | Set Your Goals with Your Supervisor | Establish your coaching goals with Supervisor. Use forms in the Guide. **Submit Your Coaching Goals.** |
| | 1:1 with Susan | Sometime in this month you should have a brief meeting (can be by phone) with the Practicum Instructor to talk about your goals for the Practicum and GCEC program. |

| | | |
|---|---|---|
| January 2016 | Conduct Assessment process with client. | Likely you will conduct a stakeholder 360° and/or other assessment with your client. Your supervisor can help you decide on interview protocols. Be sure to agree in writing with your client and their boss/board on the confidentiality arrangements for any assessment/360 reports. **Think carefully about how much assessment is appropriate and realistic. This is not a long term coaching engagement, so it's best to keep your assessment to one instrument and a few interviews for feedback data.** |
| By February 5th | Finish Debriefing the feedback | Review the findings from instruments and interviews. Start discussing implications for the coaching. |
| February 5th | Write Coaching Plan with Client | The developmental action plan should be completed in the first or second coaching meeting after the assessment feedback, so that you have time to work through several action steps before you complete the coaching. |
| February 7th | Second Weekend in Residence | Case Presentations using Critical Friends approach. In the peer supervision meetings each student will share their case in a structured presentation. In a confidential environment, you and your classmates will provide feedback, suggestions, and support to each other in your development as a coach. You will summarize the feedback and support your receive and share it with the class. |
| February-March 2016 | Conduct Coaching Sessions, Meet with Supervisor, Participate Peer Discussions | Meetings with your supervisor should be scheduled in between coaching meetings. They'll be valuable in helping you evaluate progress, talk through concerns, prepare for upcoming sessions, and debrief the past session. |
| February 14th | Midpoint in Practicum | Have all assessment and debrief meetings done, and at least 3 coaching sessions. |
| March 6th | Third Weekend in Residence | Case Presentations continue. Possible Panel of Supervisors |
| By April 3rd | Finish Coaching | Complete Coaching engagement and finalize a Long-term Development Plan with client |

| | | |
|---|---|---|
| By April 4th | Write and Gather Evaluations | Make sure your Supervisor completes your evaluation and submits it to Susan<br>Encourage your client to complete his/her evaluation of you and submit to Susan on time.<br>Complete your Self-evaluation and submit. |
| April 9th | Last weekend in Residence | Finish cases, complete your Peer Gratitudes and distribute them.<br>Bring an object that symbolizes your challenges and learning with the GCEC Program. Be prepared to give this object away. |
| April 21st | **Graduation** | |

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# Timeline for WJC Practicum 2015-2016

| Task | Oct | Nov | Dec | Jan '15 | Feb | March | April |
|---|---|---|---|---|---|---|---|
| 1. Decide if taking a SIF Client and complete Preferences | Oct 22nd | | | | | | |
| 2. Practicum Overview and Assign Chemistry Check Practice | Oct 22nd | Due Dec 1 | | | | | |
| 3. Matching of students and SIF clients and notification | | Week Nov 24 | | | | | |
| 4. Conduct Chemistry Check Meetings with Clients | | | Due Dec 31 | | | | |
| 5. Assignment of Supervisors | | By Nov 30th | | | | | |
| 6. Conduct Chemistry Check Meetings with Supervisors | | | By Dec 31st | | | | |
| 7. Conduct initial meeting with client, set up assessment process, meet with Supervisor | | | | By Jan 8th | | | |
| 8. First Weekend in Residence – Stakeholder Assessment | | | | Jan 10th | | | |
| 9. Complete Stakeholder Interviews for client | | | | By Jan 29th | | | |
| 10. Complete Client Debriefs and put Coaching Plan in place | | | | | By Feb 5th | | |
| 11. Second Weekend in Residence Begin Case Presentations | | | | | Feb 7th | | |
| 12. Half-way point in Practicum have 3-4 sessions completed | | | | | Feb 14th | | |
| 13. Third Weekend in Residence<br>14. Continue Case presentations | | | | | | March 6th | |
| 15. All evaluations due self, Supervisor, client and peer | | | | | | | April 4th |
| 16. Last Weekend in Residence -finish cases, close out event | | | | | | | April 10th |
| 17. Graduation | | | | | | | April 21st |
| **Date** | **Oct** | **Nov** | **Dec** | **Jan** | **Feb** | **March** | **April** |

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# Course Requirements

This course comprises three components: the student's practicum coaching assignment, meetings between the student and her/his Master Coach Supervisor, and course work that serve as peer review and professional development.

**The requirements to fulfill the practicum are:**

- Chemistry-check assignment completed
- A professional bio to share with clients
- Chemistry-check meetings with your potential client(s) and Supervisor
- A minimum of six coaching meetings with the coaching client
- An assessment of your client including stakeholder interviews
- A minimum of one feedback session with your client
- A minimum of six supervisory sessions with the Master Coach Supervisor
- Attendance at all classes including snow days as class will be held on-line
- Submission of required coaching documents (contracts, development plans, evaluations)
- Completion of Coaching & Supervision Logs
- Presentation of your Coaching Case
- A summary of the feedback you received about case, shared with the class
- Participation in the case discussions and feedback to your peers

**This class is a Pass/Fail class. Students will be evaluated for this class by:**

- The Master Coach Supervisor
- The coaching client
- The instructor

**All evaluation forms are in the Student Practicum Handbook or Supervisors Practicum Handbook**

*If you have an absence (planned or not), consult with Susan on what is an acceptable replacement assignment. If you miss a case presentation(s), part of your assignment will be to review the case(s) and get written feedback to your classmate.*

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# Agreement on the Limits of Responsibility For Practicum Coaching

***(To be signed by each WJC Practicum Coach and his/her Client)***

The coaching partnership may have been arranged through The Social Innovation Forum, through another individual or organization, or by the client's organization and William James College. The responsibility for the activity and outcome of the coaching between you as coach and client is shared between the two of you only and is not held by SIF, the Coach's Supervisor, or WJC. WJC has recommended to each Practicum Coach a professional set of guidelines and a coaching process to be followed, as well as a professional supervisor to support the coach in serving the coaching clients well. In the end, however, it is the full responsibility of the person being coached, along with their coach, to do whatever the two of you believe is appropriate to make your coaching a successful and mutually beneficial experience.

*Please sign and date below to designate your agreement to the responsibility you take for your coaching as Practicum Coach and Client. The Coach will return a copy of this agreement to William James College.*

Practicum Coach: (Print name) ____________________________

Signature: ________________________________ Date: _________

Practicum Client: (Print name) ____________________________

Signature: ________________________________ Date: _________

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# Instructions for the Practicum Coaching Contract

A clear contract between the coach, the client, and the client's organization clarifies roles, goals, ground rules, and practices. Negotiating the "rules of engagement" is time well spent and can prevent many misunderstandings that might impede coaching progress. The Executive Coaching Handbook for more detail on contracting.

**Both you and your client should sign the *Limits of Responsibility for Practicum Coaching* before the coaching engagement begins**. Consider that an additional part of the contracting process.

Here are some areas to cover in your contracting discussion with your client. Be sure the organizational sponsor also understands and agrees to the contract.

- Purpose and objectives
- Scope and types of assessment
- Identification and roles of stakeholders
- Agreement on confidentiality and use of coaching information
- Guidelines on honesty, openness and reliability between client and coach
- Agreements on scheduling, punctuality and cancellation of meetings
- Guidelines on giving and receiving feedback
- Understanding of when/how coach is available between meetings
- Agreements on follow up and documentation

Discuss these issues with your client and then follow up with a written summary of your agreements. You can use the following form as a template for your contract.

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# The Practicum Coaching Contract

**Client: ____________________________** **Date: __________________**

**Coach: ______________________________**

This document constitutes the agreements between Coach and Client for the Practicum Coaching including the following, plus anything else the two agree are important regarding what you will do in this coaching and how you will work together to accomplish these objectives:

- Purpose and objectives
- Scope and types of assessment
- Identification and roles of stakeholders
- Agreement on confidentiality and use of coaching information
- Guidelines on honesty, openness and reliability between client and coach
- Agreements on scheduling, punctuality and cancellation of meetings
- Guidelines on giving and receiving feedback
- Understanding of when/how coach is available between meetings
- Agreements on follow up and documentation

Your Contract:

Signed by the Coach: __________________ Signed by the Client: _______________________

# Learning Plan for the Coach

**Development and Practicum Goals:** **Use this worksheet to think through how you want to update your on-going Program Development Plan. You do not need to complete this form, if you update your plan and share it with the Practicum Instructor.**
Your learning plan will likely include goals in two areas: your own long-term development goals as you grow as a coach and the more immediate project goals that will enable you to help your practicum client. You should discuss these with your Supervisor before updating your Learning Plan and sharing it with the instructor.

Your Own Development Goals as an Executive Coach

1.

2.

3.

Your Goals for the Practicum

A.

B.

C.

**Measuring Progress**
Identify the ways you'll recognize and evaluate your progress.  Be as specific as possible – name behaviors and desired outcomes.

- 
- 
- 
- 

# Coaching Plan for Client

**Client Name: ______________________Organization: ____________**

**Coach Name: _______________________ Date: ____________________**

**Coaching Goals**
List up to 3 goals that the client will focus on during the Practicum coaching engagement:

- 

- 

- 

**Measuring Progress**
Identify the ways you'll recognize and evaluate your client's progress.  Be as specific as possible – name behaviors and desired outcomes.

1

2

**3**

4

# Introduction to Coaching and Supervision Logs

The following pages provide a place to document your coaching and supervision sessions. Both coaching and supervision sessions should cover, to varying degrees, five basic areas:

- Check-in: the point of contact, a pulse check on current state and setting the agenda for the session
- Update and follow up: what's happened since the last meeting, follow through on action items from previous meeting
- Working on development goals: what progress has been made and what needs to happen next; working through action steps with role plays, focused discussion, etc.
- Preparation for next meeting: identify assignments for time between meetings
- Session debrief: Did you get what you wanted? Are there process issues to be discussed?

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# Coaching Log

**Date of Session One:** ______________________________

**Notes:**

**Actions the client will take (with timeframes):**

**Actions you will take (with timeframes):**

**Agenda for the Next Coaching Session:**

**Issues to Discuss in Supervision:**

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# Coaching Log

**Date of Session Two: ______________________________**

**Notes:**

**Actions the client will take (with timeframes):**

**Actions you will take (with timeframes):**

**Agenda for the Next Coaching Session:**

**Issues to Discuss in Supervision:**

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# Coaching Log

**Date of Session Three: ______________________________**

**Notes:**

**Actions the client will take (with timeframes):**

**Actions you will take (with timeframes):**

**Agenda for the Next Coaching Session:**

**Issues to Discuss in Supervision:**

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# Coaching Log

**Date of Session Four: ______________________________**

**Notes:**

**Actions the client will take (with timeframes):**

**Actions you will take (with timeframes):**

**Agenda for the Next Coaching Session:**

**Issues to Discuss in Supervision:**

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# Coaching Log

**Date of Session Five:** ______________________________

**Notes:**

**Actions the client will take (with timeframes):**

**Actions you will take (with timeframes):**

**Agenda for the Next Coaching Session:**

**Issues to Discuss in Supervision:**

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# Coaching Log

**Date of Session Six:** ____________________________

**Notes:**

**Actions the client will take (with timeframes):**

**Actions you will take (with timeframes):**

**Agenda for the Next Coaching Session:**

**Issues to Discuss in Supervision:**

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# Supervision Log

**Date of Supervision Session One:**___________________________

**Notes:**

**Actions the Student Coach will take (with timeframes):**

**Actions the Supervisor will take (with timeframes):**

**Things to Remember for the Next Coaching Session:**

**Issues to Discuss in the Next Supervision Session:**

# Supervision Log

**Date of Supervision Session Two:**____________________________

**Notes:**

**Actions the Student Coach will take (with timeframes):**

**Actions the Supervisor will take (with timeframes):**

**Things to Remember for the Next Coaching Session:**

**Issues to Discuss in the Next Supervision Session:**

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# Supervision Log

**Date of Supervision Session Three:**____________________________

**Notes:**

**Actions the Student Coach will take (with timeframes):**

**Actions the Supervisor will take (with timeframes):**

**Things to Remember for the Next Coaching Session:**

**Issues to Discuss in the Next Supervision Session:**

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# Supervision Log

**Date of Supervision Session Four:**____________________________

**Notes:**

**Actions the Student Coach will take (with timeframes):**

**Actions the Supervisor will take (with timeframes):**

**Things to Remember for the Next Coaching Session:**

**Issues to Discuss in the Next Supervision Session:**

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# Supervision Log

**Date of Supervision Session Five:**___________________________

**Notes:**

**Actions the Student Coach will take (with timeframes):**

**Actions the Supervisor will take (with timeframes):**

**Things to Remember for the Next Coaching Session:**

**Issues to Discuss in the Next Supervision Session:**

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# Supervision Log

**Date of Supervision Session Six:**____________________________

**Notes:**

**Actions the Student Coach will take (with timeframes):**

**Actions the Supervisor will take (with timeframes):**

**Things to Remember for the Next Coaching Session:**

**Issues to Discuss in the Next Supervision Session:**

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# Practicum Evaluation -- Self

Us the ICF competencies as a reference if you want.
Please complete this form and e-mail to: **Susan Ennis**
**Susan_Ennis@WilliamJames.edu or Susan@susanennisassociates.com by April 4, 2016**

**Your Name: ___________________________________**

1. What do you do most effectively as an executive coach?

2. In what areas have you improved as an executive coach during your practicum experience?

3. What should you start doing or do more often?

4. What should you stop doing or do less often?

5. What progress have you made toward the goals you set for yourself in your development plan?

6. Any other observations or comments about your coaching?

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# Practicum Evaluation from Coaching Client

Thank you for your participation as a coaching client in the Graduate Certificate Program in Executive Coaching at William James College. We are very interested in learning of your experience in the program so that we can better serve you and others in the future. Please take a few minutes to provide us feedback regarding the coaching you received and the help provided by your practicum coach. This information will be used to help your coach as well as to continually improve the Practicum experience for future coaching clients. **Your responses will not be shared with anyone other than the faculty of the program and your coach. If you do not want your evaluation to be shared with your coach, please email Susan Ennis, the Practicum Instructor as to why. Thank you.** Please forward your response by **April 4th** to:

Susan Ennis, Practicum Instructor
susan_ennis@WilliamJames.edu or susan@susanennisassociates.com

Thank you.

**Your Name**: **Organization:**

**Your Coach's Name**: **Date:**

1. How helpful was the coaching you received through the Program? Please check only one:
   _____ very helpful
   _____ helpful
   _____ minimally helpful
   _____ not helpful

2. What did you learn from your coach during the coaching engagement?

3. How well do you think your coach understood you and furthered your progress toward your professional development goals?
   _____very well
   _____ well
   _____ minimally well
   _____ not well

Comments?

4. How well do you think your coach understood your organization and the organizational context for your professional development?
    _____very well
    _____ well
    _____ minimally well
    _____ not well

    Comments?

5. What tools or practices did your coach use that you found most helpful?

6. What feedback would you give your coach for her/his continued development?

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## Practicum Evaluation -- Supervisor

Supervisors should review this form with their students in the first supervisory session to establish the student's learning goals together. In the last supervisory session, supervisors and students should discuss their assessment of the student's progress and supervisors should share this completed evaluation.

Please complete this evaluation by **April 3, 2015** and forward it to Susan Ennis Susan_Ennis@WJC.edu

**Student's Name:** **Supervisor's Name:**

**Date of first supervisory session:** **Date of final supervisory session:**

*1. What learning goals were established by the supervisor/student pair at the start of the supervisory relationship?*

A.

B.

C.

*2. Did the student complete at least six coaching sessions in the allotted time?*

Yes No

If not, why not?

*3. Did the student and supervisory meet for at least six supervisory sessions in the allotted time?*

Yes No

If not, why not?

*4. Please describe the progress the student made toward the learning goals listed in question 1.*

| | |
|---|---|
| Goal A | |
| Goal B | |
| Goal C | |

*5. Graduates of the GCEC can count this program as 167 coach training hours in their application for ICF certification. They are, therefore, expected to demonstrate an adequate level of competency in the ICF model of Core Competencies for Coaches. You may or may not have had the opportunity to touch on each competency area in your supervision sessions; feel free to use n/a if you don't feel able to assess any particular area.*

Feedback for: ______________________ from: ________________ Date: _______

| **ICF Competency** | **Level of Skill 1, 2, 3, N/O** | **Comments** NOTE: Skill Level: 3-excellent, 2-good, 1-needs improvement, n/o – not observed . |
|---|---|---|
| **SETTING THE FOUNDATION**<br>1. Manages Ethical Guidelines & Professional Standards<br>2. Establishes the Coaching Agreement | | |
| **CO-CREATING THE RELATIONSHIP**<br>3. Establishes Trust & Intimacy<br>4. Has Coaching Presence & Confidence | | |
| **COMMUNICATING EFFCETIVELY**<br>5. Does Active Listening<br>6. Uses Powerful Questions<br>7. Communicates Directly | | |
| **FACILITATING LEARNING & RESULTS**<br>8. Creates Awareness<br>9. Plans & Sets Goals<br>10. Designs Actions<br>11. Manages Progress & Accountability | | |

# ICF Competencies

## SETTING THE FOUNDATION

1. MANAGES ETHICAL GUIDELINES AND PROFESSIONAL STANDARDS (Demonstrates understanding of coaching ethics and standards and ability to apply them appropriately in all coaching situations.)
2. ESTABLISHES THE COACHING AGREEMENT (Demonstrates the ability to understand what is required in the specific coaching interaction and to come to agreement with the prospective and new client about the coaching process and relationship..)

## CO-CREATING THE RELATIONSHIP

3. ESTABLISHING TRUST AND INTIMACY WITH THE CLIENT (Demonstrates the ability to create a safe, supportive environment that produces ongoing mutual respect and trust.)
4. COACHING PRESENCE (Demonstrates the ability to be fully conscious and create spontaneous relationship with the client, employing a style that is open, flexible and confident.)

## COMMUNICATING EFFECTIVELY

5. ACTIVE LISTENING (Demonstrates the ability to focus completely on what the client is saying and is not saying, to understand the meaning of what is said in the context of the client's desires, and to support client self-expression.)
6. POWERFUL QUESTIONING (Demonstrates the ability to ask questions that reveal the information needed for maximum benefit to the coaching relationship and the client.)
7. DIRECT COMMUNICATION (Demonstrates the ability to communicate effectively during coaching sessions, and to use language that has the greatest positive impact on the client.)

## FACILITATING LEARNING AND RESULTS

8. CREATING AWARENESS (Demonstrates the ability to integrate and accurately evaluate multiple sources of information, and to make interpretations that help the client to gain awareness and thereby achieve agreed-upon results.)
9. DESIGNING ACTIONS (Demonstrates the ability to create, with the client, opportunities for ongoing learning during coaching and in work/life situations, and for taking new actions that will most effectively lead to agreed-upon coaching results.)
10. PLANNING AND GOAL SETTING (Demonstrates the ability to develop and maintain an effective coaching plan with the client.
11. MANAGING PROGRESS AND ACCOUNTABILITY (Demonstrates the ability to hold attention on what is important for the client, and to leave responsibility with the client to take action.)

*6. At the close of the supervisory relationship, the supervisor and student should discuss the student's learning goals for his/her continued development. What learning goals should this student focus on over the next year as he/she continues to develop as an executive coach?*

A.

B.

C.

D.

*7. In your assessment, does this student possess the appropriate skills and attributes to qualify for certification from the Graduate Certificate Program in Executive Coaching? If not, please state why not.*

Supervisor's Signature: ______________________________________________

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# Practicum Reflections on Coaching

Reflection is a vital and often overlooked part of the learning process, and will enable you to get more from your learning experience. These journaling pages are a place to record what you've been learning during the Practicum -- the insights you've gained about your own process and about coaching in general. Write about what you would like to do differently and the bold steps you'd like to take to support your own growth and development. List the things you want to try out tomorrow and the next day, and the things you'd like to consider but will probably wait a year, or four!

Write intuitively – without knowing what you're going to say until your pen says it. Draw in the margins and in the spaces between the lines. Use different colors. Learn and have fun!

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# Practicum Coaching Checklist

(Supervisor Meetings should be spread across the Practicum and be timed to debrief client coaching sessions and prep for next one. They do not have to fit the schedule below)

| Date Done | Date Due | Task |
|---|---|---|
| | 12/31 | Chemistry Check with Supervisor |
| | 12/31 | Chemistry Check with Client |
| | 1/31 | Check-in with client's manager |
| | By 1/8 | Coaching session #1 with client |
| | By 1/8 | Client Contracting Conversation |
| | By 1/8 | Clarified Confidentiality with client and organization |
| | By 1/15 | Meeting #1 with supervisor |
| | By 1/8 | Limits of Responsibility |
| | Ongoing | Coaching Logs – complete, hand-in as needed or requested |
| | By 1/8 | Determined assessment strategy |
| | By 1/31 | Conducted client assessment |
| | By 1/31 | 1x1 Meeting with Practicum Instructor |
| | By 2/4 | Finalized client contract |
| | By 2/4 | Coaching session #2 with client |
| | By 2/4 | Meeting # 2 with Supervisor |
| | By 2/4 | Updated Development Plan finalized with your Supervisor |
| | By 2/4 | Debriefed assessment findings |
| | By 2/10 | Finalized client's coaching plan |
| | By 2/14 | Supervisors do mid-point check-in with Practicum instructor |
| | By 2/24 | Coaching session #3 with client |
| | By 2/28 | Meeting #3 with supervisor, set your coaching goals |
| | By 3/8 | Coaching session #4 with client |
| | By 3/8 | Meeting #4 with Supervisor |
| | By 3/15 | Coaching session #5 with client |
| | By 3/15 | Meeting #5 with Supervisor |
| | By 3/22 | Coaching session #5 with client |
| | By 3/22 | Meeting #6 with Supervisor |
| | By 4/1 | Finalized longer term development plan for client |
| | By 4/1 | Plan transition from client |
| | By 4/1 | Coaching session #6 with client |
| | By 4/4 | Ensure client submits your evaluation |
| | By 4/4 | Supervisor submits your evaluation |
| | By 4/4 | Submit Self-Evaluation and prep peer Gratitudes |
| | | **Weekend in Residence Dates**<br>January 10, February 7,March 6, April 9<br>Case Presentations |
| **April 21th** | | **GCEC Graduation** |

**Documents highlighted in blue must be submitted to me to get course credit**

# Critical Friends: A Process Built on Reflection

**(Taken from a paper produced by the Committee for Institutional Cooperation http://www.cic.uiuc.edu/)**

**Introduction**

The Critical Friends process focuses on developing collegial relationships, encouraging reflective practice, and rethinking leadership. This process is based in cooperative adult learning, which is often contrary to patterns established in work environments. It also addresses a situation in which many leaders find themselves – trained to work as independent units; certified as knowing all that is needed to know; feeling like the continuation of professional learning is not essential to the creation of an exciting, rich, learning environment; and that they are simply supervisors in the leadership role.

*Critical* in the context of the group is intended to mean “important” or “key” or “necessary.” Those who have used this process have found that many leaders are clumsy at being “critical.” They have further discovered that many leaders are trained to talk around and avoid difficult issues, not carefully confront them. The Critical Friends process provides an opportunity both to solicit and provide feedback in a manner that promotes reflective learning.

**Background**

The Annenberg Institute for School Reform at Brown University first developed the Critical Friends model for collegial dialogue. It is currently in use by an estimated 35,000 teachers, principals, and college professors in over 1,500 schools. In July 2000, the National School Reform Faculty program, which currently houses Critical Friends Groups and coordinates the training for Critical Friends Coaches, relocated to the Harmony School Education Center (HSEC) in Bloomington, Indiana.

As originally developed, the three “occasions” for reflection using the Critical Friends protocol are: (1) peer observations; (2) tuning a teaching artifact using the Tuning Process; or (3) consulting about an issue using the Consultancy Process. Each activity in the Critical Friends group contains elements of careful description, enforced thoughtful listening, and then questioning feedback – which may well be the basic elements of reflection. The feedback arrived at through the discussions also has been grouped in these ways: “Warm” feedback consists of supportive, appreciative statements about the work presented; “Cool” or more distanced feedback offers different ways to think about the work presented and/or raises questions; and “Hard” feedback challenges and extends the presenter's thinking and/or raises concerns. In general, this process utilizes time limits and agreed-upon purpose and norms help reduce interruptions in discussion and the rush-to-comment approach that our busy lives seem to promote.

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Graduate Certificate in Executive Coaching

# Group Member Roles

**Facilitator**

Reviews the process at the outset, even if everyone is familiar with it. Sets time limits and keeps time carefully. Participates in discussions but is on the lookout for others who want to get in conversations. Adjusts time slightly depending on participation. May end one part early or extend another, but is aware of the need to keep time. Reminds discussants of roles, warm and cool feedback, and keeping on topic that the presenter designated. Leads debriefing process and is careful about not "shorting" this part. Is careful during the debriefing not to slip back into discussion.

**Presenter**

Prepares an issue for consultancy. Is clear about the specific questions that should be addressed. Unlike most discussions of this nature, the presenter does not participate in the group discussion. Sits outside the group and does not maintain eye contact during the discussion but rather takes notes and gauges what is helpful and what is not. Later, is specific about the feedback that was helpful.

**Discussants**

Address the issue brought by the presenter and give feedback that is both warm (positive) and cool (critical). The feedback should be given in a supportive tone and discussants should provide practical suggestions.

## The "Consultancy" Process

The consultancy process allows colleagues to share issues confidentially and seek suggestions for positively overcoming or managing them. Consultancy creates opportunities for colleagues to find ways collaboratively around the obstacles and barriers that often limit or stifle effective action.

The process works best in groups where colleagues can feel comfortable sharing complex issues. Presenters share an issue, and members of the Critical Friends group offer "warm" and "cool" feedback, talking to each other not to the person who presented the issue. The presenter sits out of the group, listening, taking notes, and deciding what has been useful.

**References:**

Appleby, J. (1998). Becoming Critical Friends: Reflections of an NSRF Coach. Providence, RI: The Annenberg Institute for School Reform at Brown University.

Cushman, K. (May, 1998). How Friends Can Be Critical as Schools Make Essential Changes. Oxon Hill, MD: Coalition of Essential Schools.

Bambino, D. (March, 2002). Redesigning Professional Development: Critical Friends. Educational Leadership, 59 (6), pp. 25-27.

Note: Other articles and materials were used to create this document; unfortunately, many of the materials used in this compilation did not have identifying information and therefore it was impossible to cite the original source.

**Resources:**
Annenberg Institute for School Reform http://www.annenberginstitute.org/
Critical Friends Groups at the National School Reform Faculty, which is a professional development initiative of the Harmony School Education Center in Bloomington, Indiana http://www.harmony.pvt.k12.in.us/www/cfg1.html

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# Preparing a Case Presentation using "The Critical Friends" Reflective Process

## *WJC Executive Coaching Practicum Course*

A good coaching case presentation is built upon an experience that provides an opportunity for you to learn. Look for an exemplar that will allow you to generalize; that is, a strategy, tactic or outlook that you may be able to apply to other cases. Remember that each presentation is a learning experience for both the presenter and the rest of the class. Choose a case that you believe is important to share with others.

We will be using a reflective practice developed in the education world called "Critical Friends."

The Critical Friends process provides a solid structure for a peer learning group. The structure is designed to:

- Establish a foundation for sustained professional development based on a spirit of inquiry
- Provide a context to understand our work with clients, our relationships with peers, and our thoughts, assumptions, and beliefs about coaching and learning
- Help each other turn theories into practice

## Structure for Case Presentations

- **Presenting the Case (15 minutes)**

- **Framing the issue:**

Strive to describe the general issue you want considered in just two or three sentences.

> *E.g. I want to get better at confronting when my client doesn't do what she/he says she/he was going to do. In the situation I'm presenting, I gave an assignment for two consecutive meetings. My client had seemingly valid reasons for not completing it, but I think her failure to complete it compromised our work.*

- **Providing relevant background information:**

Here is where you need to strike a difficult balance: provide enough information for the discussants to talk about and create solutions for the issue you are presenting AND don't get bogged down in too many details of your case.

Summarize the details you think people need to understand the context of the issue. (Remember that we usually need fewer details than you are tempted to provide.) Tell us about the forces at work, perhaps something about your clients' goals, how they relate to the organizational goals, dynamics in the organization or in your coaching relationship that relate to the issue, etc.

- **Your point of view:**

Give us an idea about how you're seeing this issue, what you've tried and why, where and why you think you got stuck, etc.

- **Specify the help you want:**

Tell us what you need from the group: alternative solutions, challenges to your assumptions, a critique of your plan of action, resources to access, identification of consequences, etc.

- **Clarifying Questions (5 minutes)**

Discussants ask clarifying questions so they feel they have enough information to proceed with the discussion.

- **Discussion (20 minutes)**

Discussants discuss the case bearing in mind always what kind of help the presenter requested. The discussants speak to each other, not to the presenter. The presenter listens carefully and openly and takes notes. Presenter should try to hold him/herself back from making judgments and comments during the discussion as this might affect ability to hear all the ideas and feedback.

- **Presenter Debrief (5 minutes)**

This is the opportunity for the presenter to respond to the group discussion. It is not a time to continue the discussion with the presenter involved. It is a chance for the presenter to summarize her/his impressions of the discussion. Presenter, consider all the information gathered and identify which ideas might be useful and which you might not be likely to pursue.

- **Summary of Feedback Received**
  Write a 1-2 page summary of the feedback, questions and support you heard. Share it with the class within two weeks.