



**WILLIAM JAMES
COLLEGE**

GRADUATE EDUCATION IN PSYCHOLOGY

Graduate Certificate Program in Executive Coaching

**Coaching Supervisor's Practicum
Handbook**

2015-2016



Supervisor's Practicum Handbook 2015-2016

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Practicum Overview for Supervisors

When GCEC students begin their practicum, they have completed all three of the content area courses: “Theory, Principles and Practices in Executive Coaching,” “Coaching Skills and Techniques,” and “Assessment in Executive Coaching.” When we started the program in September, all students were required to find an informal coaching client, so they have been practicing along with their classwork.

For the Practicum Coaching Assignment, most of the student coaches are matched with a client who is a leader in a Boston-area non-profit organization. This year we are also serving clients in central and western Massachusetts and Rhode Island. Two clients have sourced their own clients. William James College GCEC, in partnership with the Social Innovation Forum, provides pro bono coaching by our students to these non-profit leaders, with the supervision of highly experienced, well-regarded executive coaches like you. Supervisors offer to serve in their roles pro bono, as a way of giving back to the community, to support the graduate education and training of executive coaches, and to help raise the level of professionalism in our field.

As a Master-Coach Supervisor, your responsibilities include:

- An initial meeting with your prospective student coach for a chemistry check to determine the “fit” for productive work together.
- A commitment to stay acquainted with updates sent out by the Practicum Instructor on the students and the program, then respond if needed.
- A total of at least 6-8 supervisory sessions with your student coach. Each supervisory session is between 60 and 90 minutes. You can use a combination of in-person and phone meetings.
- A mid-way check-in with the Practicum Instructor by email or phone.
- A written evaluation of your student coach at the end of the semester.
- A willingness to inform the Practicum Instructor of actual or potential problems with the student coach or the coaching engagement.
- Optional: Come to a class and be part of a panel, conduct a role play, present content etc.

Each student coach will have at least six coaching sessions with their client and your supervisory sessions should take place in conjunction with each of these sessions. Students maintain a log of their coaching experience, their supervisory sessions, and their case peer review session, that are part of the Practicum Class.



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Peer-review and discussion are conducted under the direction of the Practicum Instructor, and held during the Weekend in Residence classes. At the end of the course, each student receives written evaluations from you and their client. Students will be graded pass-fail for the practicum course.

All of the coaching conducted through the practicum will be expected to follow the guidelines of the *Executive Coaching Handbook* published and available at no cost on-line by The Executive Coaching Forum (executivecoachingforum.com). The International Coach Federation (ICF) Competencies are used to provide feedback throughout the GCEC program so that students can put participating in this program towards their ICF certification, if they choose to apply for it.

After the end of the semester, some students and their clients may decide to continue the coaching beyond the practicum, as an independent service. Supervisors are not obliged to provide any supervision beyond the Practicum.

Thank you



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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: <ul style="list-style-type: none"> • the roles and expectations you each have, • when and where you'll meet, • confidentiality, • when/how to include the boss/board • what kind of assessment to conduct 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 10 th	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.



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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 7 th	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 you 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 14 th	Midpoint in Practicum	Have all assessment and debrief meetings done, and at least 3 coaching sessions.
March 6 th	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



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



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 7 th		
12. Half-way point in Practicum have 3-4 sessions completed					Feb 14th		
13. Third Weekend in Residence						March 6th	
14. Continue Case presentations							
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.



Graduate Certificate Program in Executive Coaching GCEC Curriculum

Executive Coaching: Theory, Principles and Practices (3 credits)

This course examines theories and practices within the fields of psychology, organizational behavior, business and other relevant fields as they relate to the practice of executive coaching. We will explore coaching competencies, professional ethics and models of executive coaching. Students will practice basic coaching skills.

Executive Coaching Skills and Techniques (3 credits)

This course builds and/or refines the student's repertoire of basic coaching skills applicable to most executive coaching situations (e.g. self-awareness, empathy, listening, questioning, giving and receiving feedback, confrontation, limit setting, demonstrating leadership, etc.). It then develops the specialized executive coaching techniques described below. The course uses a combination of expert demonstrations, case applications, real coaching situations, peer coaching, video recording and feedback, and individualized skill, practice, and style enhancement. The five specialized coaching techniques covered in the course include developmental coaching, communication coaching, leadership coaching, management coaching, and career/life coaching.

Assessment in Executive coaching (3 credits)

This course prepares the student to plan, implement, and/or evaluate the results of an assessment for an executive coaching intervention. The student will also be prepared to work in partnership with a leader and the leader's organization to contract for targeted results and the guidelines for a coaching intervention. It introduces the variety of assessment methods that are commonly used to understand the leader and the system in which the leader works from a historical, normative, and social perspective. Methods of structured interviews, standardized surveys, 360-degree feedback instruments and interviews, and other organizational assessments are introduced and applied. Students are encouraged to take additional continuing education workshops on specific instruments and assessment methods to further their education and development.

Practicum and Professional Skills Seminars (6 credits)

An essential element of learning effective, professional executive coaching is the supervised practical application of its core competencies. Each student in this practicum will meet regularly with a highly experienced master executive coach on an individual basis as well as in peer-supervision sessions. The supervision sessions are focused on the application of everything the students will have learned in the program as well as their own unique, development needs as professional executive coaches. They can use their own actual, current executive coaching assignments for the practicum (if they have them) or the program will help them find executives or other leaders who are seeking a coaching experience. The students will maintain careful notes of their coaching sessions and a journal of their plans, reactions, and learning from the cases under supervision. Peers will provide feedback and suggestions along with the expert guidance and coaching of the master-coach practicum supervisors.



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**Agreement on the Limits of Responsibility for Practicum
Coaching**

To be signed by each William James College (WJC) Student Coach and his/her Coachee

Your coaching partnership may have been arranged through The Social Innovation Forum, through another individual or organization, or by the client's organization and WJC. The responsibility for the activity and outcome of the coaching between 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. Each student has a professional supervisor to support her/him in serving the coaching clients well. In the end, however, it is the full responsibility of the person being coached, along with the 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 Coachee. The Coach will return a copy of this agreement to WJC (The Massachusetts School of Professional Psychology)

Practicum Coach: (Print name) _____

Signature: _____ Date: _____

Practicum Coachee: (Print name) _____

Signature: _____ Date: _____



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Instructions for the Practicum Coaching Contract with Clients

A clear contract between the coach, the coachee, and the coachee's organization clarifies roles, goals, groundrules, and practices. Negotiating the "rules of engagement" is time well spent and can prevent many misunderstandings that might impede coaching progress.

You'll create a coaching contract with your coachee that will include elements of the learning and personal contract. In addition, both you and your coachee should sign the *Limits of Responsibility for Practicum Coaching* (on page 11) before the coaching engagement begins.

(Refer to The Executive Coaching Handbook for more detail on contracting).

Here are some areas to cover in your contracting discussion with your coachee. 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 (can be e-mail) of your agreements.



Graduate Certificate Program in Executive Coaching
The Practicum Coaching Contract with Clients

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: _____



Graduate Certificate Program in Executive Coaching
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.

-
-
-
-



Client's Coaching Plan

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



Coaching and Supervision Logs

Students are required to keep a log of all coaching and supervision sessions. We provide space for those notes in their handbooks. If you find it convenient, you can use the supervision log pages for your own notes.

Here are the instructions we give to students and a sample page from the coaching logs in the student's handbook.

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?*

Sample template that students are asked to use are shown here.



**Graduate Certificate Program in Executive Coaching
Coaching Log**

Date of session One: _____

Notes:

Actions the coachee will take (with timeframes):

Actions you will take (with timeframes):

Agenda for the Next Coaching Session:

Issues to Discuss in Supervision:



**Graduate Certificate Program in Executive Coaching
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:



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Practicum Evaluation -- Supervisor

Supervisors should review this form with their student coach 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 report by **April 4, 2016** and forward it to:
susan_ennis@WilliamJames.edu or susan@susanennisassociates.com
Call 781 821-4127 with questions

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.

D.



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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	

1. 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.



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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 1. Manages Ethical Guidelines & Professional Standards 2. Establishes the Coaching Agreement		
CO-CREATING THE RELATIONSHIP 3. Establishes Trust & Intimacy 4. Has Coaching Presence & Confidence		
COMMUNICATING EFFCETIVELY 5. Does Active Listening 6. Uses Powerful Questions 7. Communicates Directly		
FACILITATING LEARNING & RESULTS 8. Creates Awareness 9. Plans & Sets Goals 10. Designs Actions 11. Manages Progress & Accountability		



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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.)



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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: _____ Date: _____



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Practicum Evaluation -- Self

(To be completed by the Student Coach at the end of the Practicum)

Please complete this form as a WORD document and submit it to Susan by **April 3, 2015**.

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 should you change about your style or approach in coaching?

6. Any other observations or comments about your coaching?



Graduate Certificate Program in Executive Coaching
Practicum Evaluation -- Coaching Client

Thank you for your participation as a coaching client in the Graduate Certificate Program in Executive Coaching at the WJC. We are very interested in learning of your experience in the program. Please take a few minutes to give us feedback regarding the coaching provided by your practicum coach. This information will be used to help your coach as well as to improve the Practicum experience for future coaching clients. Your responses will be shared only with your coach and program faculty.

Please forward your responses **by April 4, 2016** to: susan_ennis@williamjames.edu or Susan@susanennisassociates.com. Call 781 821-4127 with questions

Thank you.

Your Name:

Date:

Your Coach's Name:

1. How helpful was the coaching you received through the Program? Please check only one:

- It was very helpful
- It was helpful
- It was minimally helpful
- It was not helpful

2. In what ways was the coaching you received helpful to you?

3. What are you doing differently as a result of this coaching?

4. What suggestions to you have for your coach that may be helpful to him or her in the future?



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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 January 10, February 7, March 6, April 9
		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.



Graduate Certificate Program 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.



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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.



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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.