



# COACHING TOOLKIT



PEER COACHING PROGRAM FOR PUBLIC HEALTH LEADERS  
2007-2008 PILOT PROGRAM FOR THE GREAT PLAINS PHLI  
LEADERSHIP ACADEMY

# **Great Plains**

## **Public Health Leadership Institute**

### **PEER COACHING PROGRAM FOR PUBLIC HEALTH LEADERS**

2007 – 2008 PILOT PROGRAM FOR ALUMNI SCHOLARS, YEARS 1 AND 2

Please note the Great Plains PHLI Peer Coaching Program is still in its pilot phase. Revisions and adaptations will be made by faculty and consultants as we progress throughout year one of the program. The Great Plains PHLI will be happy to share our findings and final toolkit when year one is completed. The ensuing toolkit is in draft and should not be distributed without the expressed permission of the Great Plains PHLI.





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#### **INTRODUCTION AND ACKNOWLEDGMENTS**

*"Our chief want in life is someone who will make us do what we want." —EMERSON*

*"Coaching consistently led Executive Directors to report significantly higher impact in specific management areas, stronger leadership skills and more hopefulness and confidence that they could create a more sustainable job for themselves...we believe that coaching, for both individuals and groups, can play a much larger role in growing and maintaining leadership within the nonprofit sector."*

*Executive Coaching Project, Evaluation of Findings, Executive Summary.*

*Study conducted by Harder+Company Community Research for CompassPoint.*

This Great Plains PHLI Peer Coaching Toolkit provides the essential information Alumni Scholars will need to effectively assume their roles as peer coaches. It is a shared resource and references many other resources available to participants eager to strengthen their coaching skills.

At the heart of this coaching program is the belief that leadership competency expands as peers join together for mutual support and growth. Peer coaches are the most valuable resource in this new program. We acknowledge and appreciate your commitment to your ongoing learning as leaders, and that of your peers. Together we strengthen leadership for the public's health.

This program was co-created by Eileen Blumenthal, JD, EdM, Partner, Rocket Science Coaching & Consulting, and Magda Peck, ScD, Director, Great Plains Public Health Leadership Institute with excellent contributions from Brandon Grimm, MPH, Great Plains PHLI Coordinator. Ms. Gail Ginder of the Claros Group contributed mightily to the conception of the peer coaching program and to this Toolkit. The Toolkit is a collaborative product of this dynamic team.

Support for this pilot program is anticipated from the Centers for Disease Control and Prevention, Office of Workforce Development, with ongoing support from the Nebraska Educational Alliance for Public Health Impact, at the University of Nebraska Medical Center, Omaha NE, and the Upper Midwest Public Health Training Center, at the University of Iowa.

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**Leadership Competencies:**

- #1: Understand and practice the skills of feedback, coaching, and mentoring
- #4: Understand own personal styles, behaviors, preferences, and mission for leadership

**Objectives:** As a result of this 5 hour training session in peer coaching for public health leaders, participants will be able to:

- I. Describe key coaching principles, distinguished from mentoring and therapy, as a tool for professional development
- II. Understand how coaching works in practice, including skills and potential barriers
- III. Practice coaching skills through interactive activities, following the GROW model
- IV. Understand the Great Plains PHLI Peer Coaching Program, to be offered in 2007-2008

***Day 1: Wednesday September 19, 2007***

Time	Activity Description	Faculty/Staff Lead
2:00-2:15	Welcome and Introductions	Eileen Blumenthal & Magda Peck
2:15-2:45	Coaching Framework	Eileen Blumenthal
2:45-3:45	Fundamentals of Coaching	Eileen Blumenthal
3:45-4:00	Introduction of the GPPHLI Peer Coaching Model	Magda Peck
4:00-5:00	Break ---Homework	All
<b>6:00-???</b>	<b>Rest, Relax, Eat, Drink, Celebrate</b>	<b>Graduate Planned</b>
5:00-8:00	One-On-One Coaching Time Available	Eileen Blumenthal

***Day 2: Thursday September 20, 2007***

Time	Activity Description	Faculty/Staff Lead
8:30-8:45	Debrief Homework	Eileen Blumenthal
8:45-10:15	Review Models/Skills ---- Peer Coaching in Action	Eileen Blumenthal
<b>10:15-10:30</b>	<b>Break</b>	
10:30-10:45	Review GPPHLI Peer Coaching Model	Magda Peck
10:45-11:20	Speed Coaching	Magda Peck
11:20-11:45	Wrap Up, Turn in Evaluations, Say Good Bye	All
	<b>Lunch Available in the Timber Dining Room</b>	



## **FIVE PRINCIPLES OF PEER COACHING**

### **1. THE PEER COACHING RELATIONSHIP IS RECIPROCAL, CONSCIOUSLY DESIGNED, AND SAFEGUARDS CONFIDENTIALITY. (*How we are together*)**

- Mutuality is at the heart of peer coaching. Awareness is heightened through self reflection as coachee, and by reflective listening as coach.
- It is important for coach and coachee to consciously and deliberately design their working relationship, and to redesign as necessary.
- Establishing and holding confidentiality and boundaries is fundamental to a successful peer coaching relationship. If coachees are to work on significant issues, they must be able to talk freely and trust their coach.

#### *Guidelines*

- When designing your relationship, answer questions such as: *What are the conditions that need to be in place for the two of us to work together effectively? What are the obstacles or potential obstacles we face?* As the coaching proceeds, ongoing design questions may include: *What is working and what is not? What do we need to change to enhance our effectiveness?*
- Establish a rhythm of mutuality and stick to it. Ensure that each of you coaches and is coached – practicing one strengthens the other.
- Spell out what confidentiality means – it can include the fact that you are peer coaches as well as the content of your coaching. Explicitly commit to holding it all confidential.
- As coach, keep your coach hat on – decide together if another resource is called for (for example, training, mentoring, consulting, therapy), and hold those boundaries.

### **2. PEER COACHING IS A CHANNEL FOR AWARENESS, INSIGHT AND INCREASED COMPETENCY FOR THE COACH AND COACHEE. (*What we get*)**

- The mutuality and ongoing dialogue of peer coaching provides a structure to consider challenges and objectives in a dynamic free of evaluation and power.
- The peer exchange of experiences and insights into the practice of others provides great value for the coach and coachee.
- During a peer coaching session, the focus is on the coachee, not the coach.

*Guidelines*

- Commit to a reciprocal relationship and practice mutuality – alternate as coach and coachee, ensuring each of you experiences each equally.
- Commit to regularity, agreeing to maintain a consistent and reliable peer coaching practice.
- Maintain the focus on the coachee and his/her agenda, awareness, insight and increased competency. Self-manage your learning as coach so as not to divert the coachee's process.

**3. THE AGENDA FOR PEER COACHING IS DEEPENING THE LEARNING AND FORWARDING THE ACTION. (*What we do*)**

- Learning creates awareness, resourcefulness, perspective and possibilities.
- Action moves coachees forward and animates learning.
- Learning and action together create results.

*Guidelines*

- Peer coaching is not about solving problems or enhancing performance for one another, although problems may be solved and performance may be enhanced.
- Discovery happens on several levels – try and access them all.
- Focus on values to help generate discovery and guide choices.
- As coach, help the coachee access their own knowing and strength, even when they don't think they know or don't feel strong. Resist the urge to give answers. Ask questions and invite discovery instead.

**4. PEER COACHEES ARE CREATIVE, RESOURCEFUL AND RESPONSIBLE FOR THEIR OWN LEARNING. (*How I am as coachee*)**

- Coachees are strong and capable, not weak or dependent.
- Coachees have, or can find, the answers.
- Coachees are more resourceful, more effective, and generally more satisfied when they come up with their own answers.

*Guidelines*

- As coachee, trust yourself and your own knowing.
- As coachee, commit to taking responsibility for your own progress. You'll benefit most if you are clear on your specific agenda within the larger agenda of learning and action.
- As coach, don't conspire with your coachee's saboteurs. Help quiet those judgmental voices (without being impractical or reckless) and get beyond fear.

**5      PEER COACHES ARE CURIOUS, INTUITIVE AND CATALYTIC.** (*How I am as coach*)

- Coaches ask questions and invite insight.
- Coaches articulate what they observe and what they sense.
- Coaches trust and empower coachees to find clarity and their own solutions, encouraging and supporting them along the way.
- Coaches hold the client's agenda, making certain goals are clear and accountability is present.

*Guidelines*

- As coach, give up being the expert, needing to know, or having the answers. Ask questions without knowing the answers.
- As coach, be yourself authentically rather than role play. Authenticity will help create the trust necessary for deep learning.
- It's acceptable, even desirable, to take charge as a coach, particularly in order to advance learning and forward action.
- Avoid asking for data – go deeper for values and motivation.
- Listen for what is not directly observable, using all your senses.
- If you have a hunch or a gut feeling, offer it up without attachment. See if your intuition resonates with your coachee or triggers something more useful.

*Adapted from Whitworth, Laura, Kimsey-House, Karen, Kimsey-House, Henry, Sandahl, Phillip. Co-Active Coaching: New Skills for Coaching People toward Success in Work and Life, 2<sup>nd</sup> Edition. Mountain View, California: Davies-Black Publishing, 2007.*



# Great Plains Public Health Leadership Institute

## DISTINGUISHING COACHING, MENTORING AND THERAPY

### **COACHING**

- The person being coached is the “expert.”
- It is a partnership with shared responsibility for success.
- Responsibility for problem solving is with the person being coached.
- Powerful questions facilitate discovery, awareness and insight.
- Coaching deals with resolving current issues and challenges as well as envisioning and preparing for a desired future.
- Focus: deepening learning and forwarding action.

### **MENTORING**

- The mentor provides advice and guidance based on his or her own expertise or experience.
- The mentor and person being mentored are usually in the same field or have followed a similar career path.
- The mentor assists with networking and making valuable connections.
- It is often a hierarchical relationship – the mentor is the true “expert.”
- Focus: career success and advancement.

### **THERAPY**

- There are few boundaries to the discussion.
- Therapy sessions usually have increased intensity and the therapist has a greater responsibility for the relationship.
- Therapists are trained to diagnose emotional problems.
- Therapeutic conversations often deal with resolving difficulties from the past.
- Focus: healing, pain, dysfunction, and quality of life.

*Adapted from the work of Gail Ginder, Claros Group*



## PEER COACHING MODEL: GROW

### **SET GOALS FOR THE SESSION, THE SHORT-TERM, AND THE LONG-TERM**

- Determining the goal for the session itself
- Setting an end goal – articulating the final objective
- Identifying the performance level that will optimize achieving the end goal

#### *Guidelines*

- Be sure your coachee owns the goal
- Coach for **SMART, PURE and CLEAR** goals
  - Specific, Measurable, Attainable, Realistic, and Time-Phased
  - Positively stated, Understood, Relevant, and Ethical
  - Challenging, Legal, Environmentally sound, Agreed Upon, Recorded
- Go beyond articulating goals -- design a process for achieving goals

#### *Examples of questions*

- What result do you want to create?
- Why is this goal important to you? What values does it honor?
- What do you need to put in place to achieve this goal?
- Are you really committed to this goal or is there ambivalence?

### **DO A REALITY CHECK TO EXPLORE THE CURRENT SITUATION**

- Clarifying the current situation
- Perceiving things as they really are, objectively
- Checking reality on several levels – descriptive, sensual, emotional, attitudinal
- Being pro-active rather than reactive or psychoanalytical. Getting beyond the superficial, but staying out of the therapy realm.

#### *Guidelines*

- Detach from the situation as coach and elicit factual answers
- Encourage your coachee to describe reality, rather than evaluate it
- Follow, rather than guide, your coachee

- Include your coachee's senses and body-awareness
- Tap into your coachee's emotions
- Raise your coachee's self-awareness of conscious thoughts and attitudes, including self-limiting ones

*Examples of questions:*

- What have you accomplished to date?
- What obstacles have you encountered/overcome?
- Is there a saboteur limiting you?
- What comes up for you as you consider pursuing this strategy?
- What's your track record in this area?

## **CREATE OPtions AND ALTERNATIVE STRATEGIES OR COURSES OF ACTION**

- Creating and capturing a broad base of creative possibilities with as many alternative courses of action as possible
- Avoiding or overcoming preferences, censorship, ridicule, obstacles, and the need for completeness, at this stage
- Examining options for benefits and costs, advantages and disadvantages

*Guidelines*

- Maximize choices by creating a safe environment free of inhibition, fear or judgment
- Disarm negative assumptions – saboteurs, censors, gremlins
- Increase clarity about pros and cons

*Examples of questions*

- What options do you have?
- What does your gut tell you about the best course of action?
- Imagine you'll succeed, whichever option you choose. What do you choose?
- What are the risks of each option, and what's the potential payoff?

## **LOCK IN WHAT IS TO BE DONE, WHEN, BY WHOM AND THE WILL TO DO IT**

- Moving from discussion to decision
- Constructing the action plan
- Activating the will of the coachee (rather than imposing your own or someone else's)
- Locking in the commitment and accountability

*Guidelines*

- Identify **what** the coachee will do (action plan)
- Determine **when** it will be done (time frame)
- Check back – will this action, in this time frame, lead in the desired direction, toward the session and end goal
- Anticipate and prepare for obstacles – strengthen the commitment and the **will**
- Lock it in – identify who needs to know, what support is required, and ascertain degree of commitment; record plan and agree to it
- Plan for and hold accountability over time

*Examples of questions*

- What are you willing to do?
- By when will you do this?
- How will this action move you closer to your goal?
- Does this plan resonate with your values?
- How will I know you've succeeded?
- With whom else will you share your intentions so there's even more accountability?

*Adapted from Whitmore, John. Coaching for Performance, A Practical Guide to Growing Your Own Skills. San Diego: Pfeiffer & Company, 1994.*



## FIVE PEER COACHING SKILLS

### **1. ASK POWERFUL QUESTIONS**

- Powerful questions invite introspection and invite clients to look inside or into the future.
- Powerful questions stop people in their tracks.
- Powerful questions are open-ended and create learning and perspective.
- Powerful questions are appropriate for discovery *and* implementation.

#### *Guidelines*

- Ask questions that elicit insight rather than information.
- Remember that your coachee is creative, resourceful and responsible for their learning. Be courageous on your coachee's behalf – ask the tough questions and hold accountability.
- Sometimes powerful questions are the most simple ones and cut through the layers of complexity and confusion.
- Avoid compound questions – as a rule, short is good.

#### *Examples*

- What do you really want?
- What would make the greatest difference?
- What if you acted more courageously than you ever have before?
- What most resonates with your values and inner knowing?
- If you could do it over again, what would you do differently?
- If you fast forward to a year from now and look back, what would you want to say about your leadership?
- What support do you need to succeed?
- What exactly will you do, when will you do it, and how will I know you've done it?

## 2. LISTEN

- Everything in peer coaches hinges on listening.
- Focus sharply on your coachee rather than on your own knowing.
- Listen for what is not directly observable – what's between the lines.

### Three Levels of Listening:

- Level One: Internal Listening
  - Focus is inward
  - Awareness on self – what it means to me, my thoughts, my judgments
  - "Self-absorbed" level -- appropriate for coachees, not coaches
- Level Two: Focused Listening
  - Sharp focus on the other person – listening for their words, their expressions, emotions, what they're not saying
  - For the coach, it's the level of empathy, clarification, connection, unattached to your own agenda, thoughts, opinions
  - Can take in coachee's tone, pace, feelings
- Level Three: Global Listening
  - Like "environmental" listening – includes everything you can observe with your senses, your intuition
  - Here you notice temperature, energy, lightness/darkness
  - Takes into account your own impact as coach

### Guidelines

- As coach, try and operate at levels two and three. If you find yourself at level one, reconnect with your coachee at levels two and three.
- Have your questions and observations as coach come from levels two and three – respond to what you're hearing rather than from your own agenda.
- Articulate clearly what you're hearing at levels two and three -- help your coachee connect the dots through observations or questions.
- Ask for clarity based on level two and level three listening.
- Use metaphors when your listening suggests imagery would be helpful.

### Examples

- Your energy changed when you referred to that encounter. What's important to remember about those dynamics?
- This is what I think I heard you say. Is that right?
- Is it like pushing a boulder up hill?

### **3. ACKNOWLEDGE AND CHAMPION**

#### **Acknowledging**

- Acknowledgment goes deeper than praise of a job done/well done – it addresses who the person is and their inner character. Both are important.
- Acknowledgments give coachees greater access to what they might dismiss in themselves because of humility or an inclination to deflect.
- Acknowledging requires knowing what is important to the other person – his or her values and motivations and true nature.

#### *Guidelines*

- Set the foundation for acknowledgment by surfacing your coachee's values and touchstones for meaning. Acknowledge alignment and resonance with those.
- Notice if your acknowledgment lands, or if your coachee deflects.
- When a coachee is acknowledged, he or she feels seen. Let your levels two and three listening inform your acknowledgments.

#### *Examples*

- Your honesty in dealing with that conflict was inspiring.
- Congratulations. I know what a huge risk you took.
- You may not have reached your goal, but look at the progress you've made and what obstacles you had to overcome.

#### **Championing**

- Championing is like acknowledging, but goes beyond recognizing/articulating who clients had to be in order to do what they have done. Championing supports coachees and affirms them when they may question their abilities.
- Championing is expressing what you know is true of your coachee, even if he/she doesn't know it. It's affirmation and a capacity to see your coachee's capacity.
- Championing is often forward-looking. You see them at the finish line.

#### *Guidelines:*

- Championing isn't empty cheerleading. Make sure it has power and impact.
- You can only champion what you know is true – be sincere and genuine.
- Specificity, like sincerity, is essential. Let coachees know *specifically* what you know they can do.

#### *Examples*

- You are so committed to this, I truly believe you can do it.
- What would it take to win the gold medal rather than just finish the race?
- You've been preparing for this and you're ready to try – go for it.

## 4. REQUEST AND CHALLENGE

### Requesting

- Requests forward specific and measurable action.
- Requests are where the rubber meets the road – where intentions turn to action.
- Requests flow from the coachee’s agenda, in furtherance of their goals.

#### *Guidelines*

- Make requests specific and measurable so coachees know what they’re agreeing to and so that coaches can hold accountability.
- Ask for a commitment with your request – e.g., will you commit to doing that?
- Don’t be attached to your request – your coachee should know they have the option of saying yes, no, or giving you a counteroffer. The goal is to forward the action not be right or brilliant.

#### *Examples*

- My request is that for the next two weeks you spend the last fifteen minutes of your day organizing your desk. Will you do that and e-mail me on Friday to let me know how it went?
- I request that you get information on graduate schools in time for our next meeting and report in on your first, second and third choices. Agreed?
- OK, if you’re not willing to discuss that with your boss, what will you do this week to improve the situation?

### Challenging

- Challenges ask coachees to go beyond their self-imposed limits.
- Challenges often allow coachees to practice essential skills.
- Challenges embolden coachees by showing strong belief in them and their abilities.

#### *Guidelines:*

- Offer challenges that represent a stretch – a push to the next level.
- Notice how your challenge lands. If your coachee’s jaw drops, you’re in the right territory.
- Tap into your coachee’s creativity and resourcefulness; ask them to do the same.

#### *Examples*

- I challenge you to make that call as soon as our meeting ends.
- I challenge you to find five opportunities to say “no” today.
- How about if you resign from every committee you’re currently serving on?

## **5. HOLD ACCOUNTABILITY**

- Accountability is a measuring tool for action and a means of reporting on learning.
- Accountability is the opportunity for coachees to report on their experience free of judgment or blame.
- Accountability is the fundamental structure that keeps coaching working.
- Accountability can be quantitative, or focus on qualitative goals.
- Accountability is important when there's success and when there's failure.

### *Guidelines*

- Coach and coachee need to have a very specific agreement on what the coachee will be held accountable for.
- Go beyond the action your coachee did or did not take – find out what their experience was, what they learned, what they want to do next and why.
- Identify obstacles that arose and what the learning is going forward.
- Celebrate success and normalize failure. Failure is sometimes the best threshold for making change, or the clearest sign of not going far enough. Explore and acknowledge the disappointment, if any, and then distill the learning. And be sure to distinguish *failing at* something from *being* a failure.

### *Examples*

- What will you do, when and how will I know?
- You said you want to be a more influential leader. Will you do some journaling on influential leaders you respect and share your learning with me next time we talk?
- You didn't deliver as promised. What changed? Are you still committed to this plan going forward? What do you need to factor into your planning?
- How was it to fail at that? What can you learn?
- You did what you said you'd do. Congratulations on keeping your commitment and prioritizing what you said was important. What was this experience like for you?

*Adapted from Whitworth, Laura, Kimsey-House, Karen, Kimsey-House, Henry, Sandahl, Phillip. Co-Active Coaching: New Skills for Coaching People toward Success in Work and Life, 2<sup>nd</sup> Edition. Mountain View, California: Davies-Black Publishing, 2007.*



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## PEER COACHING TIPS

### AS COACHEE

- Ask for what you need, be direct and don't edit. It'll help your coach!
- Notwithstanding the item above, don't help your coach. It won't help.
- Begin with a beginner's mind – look at every situation with a fresh mind.
- Remember, you have the answers, not your coach. If you don't have an answer, pretend you do to get beyond not knowing. See if you know more than you think you know.
- You're responsible for your coaching experience. Notice what is working and build on that. If something isn't working, let your coach know and redesign.
- Follow-through on your commitments, no kidding. Only agree to something if you intend to do it. Feel free to counter-offer.
- Peer coaching is, by design, ongoing. Take the long view and look for learning and action over time.
- Practice bottom-lining – distilling what you want to say to its essence.
- Stay realistic about the coaching agenda – remember, it's not mentoring or therapy.
- Failure is great grist for coaching-- use coaching to learn from failures.
- Limit distractions when coaching – turn off those electronic devices and give the coaching your full attention and focus.

## AS COACH

- Peer coaching thrives in part because of the absence of an unequal power dynamic. Stay true to this and avoid establishing rank.
- Ask permission up front to interrupt, redirect, and disagree. Give your coachee permission, and even encouragement, to do the same.
- Be willing to speak with candor, especially once you have permission.
- Stay open to feedback about your coaching. In fact, request it. Try and avoid being defensive, trusting that giving and receiving feedback is part of redesigning and will enhance the coaching experience.
- It's OK to not have direct experience with your coachee's issues. It's even good, and will help you focus on your coachee rather than substitute your experience or preferences.
- Listen for meaning rather than details or data. Don't get hooked by stories or drama. Get comfortable with silence. If you ask a really powerful question it may stop your coachee in his/her tracks. That means you're on to something.
- When you make a request or a challenge, make it powerful and be sure you know the response. If you get a no, ask for a counter-offer.
- Detach from being right.
- Make observations generously, and assumptions and judgments sparingly. If you make an assumption, test it. If you have a judgment, get curious and ask about the thing prompting your judgment.
- Avoid using your own performance as a yardstick for your coachee's.
- Follow-through on your commitments. If you agreed to check on progress or hold accountability, be sure to do it.
- Prepare for coaching sessions by reviewing your coaching log in advance.
- Limit distractions when coaching – turn off those electronic devices and give the coaching your full attention and focus.



## **PEER COACHING PITFALLS**

### **COMMON PITFALLS FOR THE COACHEE**

- Unwillingness to commit
- Unrealistic expectations
- Defensiveness
- Passive role in the coaching process
- Playing it safe
- Being a victim
- Deferring to perceived expertise of the coach

### **COMMON PITFALLS FOR THE COACH**

- Assuming or expecting that others will behave the same way we do or have the same motivation we do
- Telling people what to do
- Solving problems instead of building competence
- Offering advice
- Corralling people
- Getting hooked by the story

*Adapted from the work of Gail Ginder, Claros Group*



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### PEER COACHING AT A GLANCE

#### PRINCIPLES

- ✓ The peer coaching **relationship** is reciprocal, designed, and confidential.
- ✓ Peer coaching is a **channel** for awareness, insight and increased competency.
- ✓ The **agenda** for peer coaching is deepening learning and forwarding action.
- ✓ Peer **coachees** are creative, resourceful and responsible for their own learning.
- ✓ Peer **coaches** are curious, intuitive and catalytic.

#### MODEL: GROW

- ✓ Set **GOALS** for the session, the short-term, and the long-term.
- ✓ Do a **REALITY** check to explore the current situation.
- ✓ Create **OPTIONS** and alternative strategies or courses of action.
- ✓ Lock in **WHAT** is to be done, **WHEN**, by **WHOM**, and the **WILL** to do it.

#### SKILLS

- ✓ Ask powerful questions
- ✓ Listen on levels one, two and three
- ✓ Acknowledge and champion
- ✓ Request and challenge
- ✓ Hold accountability

#### REMEMBER, AS COACH...

- ✓ Detach from being right, from being the expert, from having the answers.
- ✓ Intrude when you need to, don't get hooked on stories, help with bottom-lining.
- ✓ Self-manage so it's not about you, your experience, your assumptions, your advice.
- ✓ Focus on both what your coachee *does*, and who your coachee is *being*.
- ✓ Keep boundaries. Avoid mentoring. Suggest therapy if advised.
- ✓ Embrace it all – the success, the failure, and especially the learning.



## **PEER COACHING PROGRAM FOR PUBLIC HEALTH LEADERS**

### **2007 – 2008 PILOT PROGRAM FOR ALUMNI SCHOLARS, YEARS 1 AND 2**

Understanding and practicing the skills of feedback, mentoring and coaching is one of 24 core leadership competencies which anchor the Great Plains Public Health Leadership Institute's work. Our Institute is committed to life-long leadership learning among our graduating Scholars. The Leadership Institute year-long curriculum includes components on feedback and mentoring. As we reach a critical mass of alumni in 2007, we are launching a peer coaching program to support and sustain their leadership development. We invite Great Plains Scholars who graduated in 2006 and 2007 to participate in the pilot year of this new program. Here is basic information about its components "at-a-glance."

#### **1. TRAINING**

- The program begins with a 5 hour on-site training (September 19-20, 2007) with guest faculty, Eileen M. Blumenthal, J.D., EdM, Rocket Science Coaching and Consulting (San Francisco, CA), who is certified by the Coaches Training Institute and the International Coaches Federation.
- Each trained peer coach will have the option of a 30 – 45 minute 1:1 coaching session with Ms. Blumenthal (or another ICF certified coach) to experience coaching in action. The first opportunity for this will be on site during the September training.
- During the six months of peer coaching, there will be two scheduled teleconferences for general technical assistance and continued learning.
- Personal technical assistance to peer coaches will be available upon request

#### **2. PRACTICE**

- Trained Alumni Scholars volunteer to participate in a six month pilot program, November 2007 – April 2008, following the September 2007 training.
- Trained Alumni Scholars are matched by Institute faculty based on expressed preferences to be peer coaching partners for dedicated 1:1 coaching. Each participant will sign a written agreement about the terms of the partnership.
- Participating peer coaching partners are expected to connect for coaching at least 8 times over six months, in person or via telephone.
- Each coaching session lasts 1 – 1.5 hours, during which each partner provides and receives coaching for 30 – 45 minutes.

- Scheduling of peer coaching sessions is done by peer coaching pairs by mutual arrangement; communications and other costs are shared responsibility of the peer coaches.
- Challenges and/or conflicts to these arrangements are to be communicated in a timely manner for assistance and resolution.

### 3. REFLECTION

- Each participating peer coaching partner will keep a confidential Progress Log to track coaching communications and highlights.
- We encourage regular journaling for ongoing reflection.

### 4. ASSESSMENT

- Each participating peer coaching partner will submit a progress report in the form of a journal entry twice during the six month period.
- Each participating peer coaching partner will contribute to program evaluation, including short Zoomerang on-line assessments at the beginning, middle and end of the pilot project period.
- Participants and Institute faculty will work together in Spring 2008 to assess overall program design, participant satisfaction, and perceived utility of peer coaching for ongoing public health leadership development.

The Great Plains PHLI Peer Coaching Toolkit will serve as a shared resource during implementation. Each participant will receive a peer coaching certificate following successful completion of the program. Coaching partners may re-commit to another 6 months of working together, starting in May 2008. Alternatively, certified peer coaches may enter into new coaching partnerships after completion of the program, through the Great Plains Public Health Leadership Institute.

Support for this pilot program is anticipated from the Centers for Disease Control and Prevention, Office of Workforce Development, with ongoing support from the Nebraska Educational Alliance for Public Health Impact, at the University of Nebraska Medical Center, Omaha NE, and the Upper Midwest Public Health Training Center, at the University of Iowa. For more information, contact Dr. Magda Peck ([mpeck@unmc.edu](mailto:mpeck@unmc.edu)), Director or Mr. Brandon Grimm ([blgrimm@unmc.edu](mailto:blgrimm@unmc.edu)), Coordinator, Great Plains PHLI, 402-561-7562.

# **Great Plains**

## **Public Health Leadership Institute**

### **RECENT FINDINGS ON COACHING**

#### **Peer coaching as a strategy for development of leadership competency** (attached)

Study by professors at Curtin University of Technology, showing the effectiveness of reciprocal peer coaching as a strategy for the development of leadership and management competency:  
<http://www.ecu.edu.au/conferences/tlf/2002/pub/docs/Ladyshevsky.pdf>

#### **Coaching leaders in the nonprofit sector** (attached)

2003 evaluation of findings on effectiveness of executive coaching for Executive Directors of non-profit organizations conducted by CompassPoint NonProfit Services:  
[http://www.compasspoint.org/assets/2\\_cpcachingexecsumm.pdf](http://www.compasspoint.org/assets/2_cpcachingexecsumm.pdf)

#### **General articles/research on peer coaching (most focus on academic sector):**

1995 paper showing positive effects of peer coaching on bilingual educators:  
<http://www.ncela.gwu.edu/pubs/directions/03.htm>

Description of Washington state's peer coaching program for teachers (sponsored by Microsoft): <http://www.edtech.wednet.edu/programs/coaching/default.shtml>

Description of peer coaching program run by Illinois Arts Alliance/Foundation describing use of peer coaching circles for staff at arts organizations: [http://www.artsalliance.org/l\\_peer.shtml](http://www.artsalliance.org/l_peer.shtml)

September, 2007 article on Tech Learning website about peer coaching (focuses on teachers):  
<http://www.techlearning.com/showArticle.php?articleID=196604656>

#### **Peer coaching and health:**

2005 study on impact of peer coaching on doctors' ability to make better decisions on PSA screening of male patients:  
<http://fampra.oxfordjournals.org/cgi/content/abstract/22/3/253>

June 2003 article on American Psychological Association website on using peer coaching to increase access to mental health in rural areas:  
<http://www.apa.org/monitor/jun03/access.html>

March/April 2005 article in Journal of Continuing Nursing Education on peer coaching related to staff development among health professionals. (NOTE: Have to purchase for \$15):  
<http://www.jcenonline.com/view.asp?rID=4295>

### **Coaching and health:**

Press release on CDC-funded health promotion/disease management program using coaching:  
<http://www.ohsu.edu/hms/pdf/CDCPressRelease.pdf>

Research on Healthy Lifestyle Coaching, Motivational Interviewing, and Stages of Change:  
Outcomes on what does and does not work conducted by Optum:  
<http://www.optumanswers.com/research/articles/lifestylecoaching.shtml>

July, 2005 Penn State study on integrating a health coach into primary care:  
<http://www.ncbi.nlm.nih.gov/article/fcgi?artid=1466965>

July, 2007 article in “Medical News Today” reviewing positive results from studies on the effects of coaching for doctor’s visits: <http://www.medicalnewstoday.com/articles/77366.php>

Description of Executive Coaching Study at Case Western Reserve University, Weatherhead School of Management, focusing on how coaching can enhance the profession of dentistry.  
NOTE: the study is not yet completed, this is just a description:

<http://www.case.edu/dental/dentalpractice/research/ExecutiveCoachingStudy.pdf>

### **General coaching articles:**

July, 2003 New York Times article about coaching (general), with focus on individual stories:  
<http://query.nytimes.com/gst/fullpage.html?res=9C00E7DE163CF930A25754C0A9659C8B63&sec=health&spon=&pagewanted=all>

Harvard Business School article on coaching (general): <http://hbswk.hbs.edu/archive/4853.html>

March, 2007 New York Times article about coaching in the entertainment industry:  
<http://www.nytimes.com/2006/03/26/fashion/sundaystyles/26COACH.html?ex=1301029200&en=4d4d0eaf5bd98451&ei=5088&partner=rssnyt&emc=rss>

Link to purchase article from Harvard Business School called “Wild West of Executive Coaching”. Cost is \$6.50 to download PDF file. Article is written by CEO and VP of a coaching firm and focuses on benefits of coaching.

[http://harvardbusinessonline.hbsp.harvard.edu/b01/en/common/item\\_detail.jhtml?id=R0411E&eferral=2340](http://harvardbusinessonline.hbsp.harvard.edu/b01/en/common/item_detail.jhtml?id=R0411E&eferral=2340)

**General research/studies on coaching:**

1997 research study on effectiveness of coaching (was done by executive coaching firm):  
<http://www.coachexecs.com/researchstudy.html>

2005 study showing link between coaching and business performance (was conducted by coaching firm): [http://www.quilken.co.uk/Executive-Summary\\_Quilken-Exec-Coaching-Research -Cathy-Fenne.pdf](http://www.quilken.co.uk/Executive-Summary_Quilken-Exec-Coaching-Research -Cathy-Fenne.pdf)

2005 University of Georgia, Athens, Terry College of Business article on the use of executive coaching as a developmental intervention for managers. REQUIRES SUBSCRIPTION FOR FULL ARTICLE: <http://jom.sagepub.com/cgi/content/abstract/31/6/829>

2006 research article finding that coaching increased managerial flexibility (summary only; full article costs \$25):

<http://www.ingentaconnect.com/content/mcb/022/2006/00000027/00000007/art00004>



## **PEER COACHING PROGRAM FOR PUBLIC HEALTH LEADERS**

2007 – 2008 PILOT PROGRAM FOR ALUMNI SCHOLARS, YEARS 1 AND 2

### **RECOMMENDED READING**

Carson, Richard D. Taming Your Gremlin: A Guide to Enjoying Yourself. Dallas: HarperPerennial, 1983.

Coaching People. Boston: Harvard Business School Publishing Corporation, 2006.

Flaherty, James. Coaching: Evoking Excellence in Others. Burlington, MA: ELSEVIER/Butterworth-Heinemann, 2005.

Hargrove, Robert. Masterful Coaching: Extraordinary Results by Impacting People and the Way They Think and Work Together. San Francisco: Jossey-Bass/Pfeiffer, 1995.

Orem, Sara L., Binkert, Jacqueline, Clancy, Ann L. Appreciative Coaching: A Positive Process for Change. San Francisco: Jossey-Bass, 2007.

Whitmore, John. Coaching for Performance, A Practical Guide to Growing Your Own Skills. San Diego: Pfeiffer & Company, 1994.

Whitworth, Laura, Kimsey-House, Karen, Kimsey-House, Henry, Sandahl, Phillip. Co-Active Coaching: New Skills for Coaching People toward Success in Work and Life, 2<sup>nd</sup> Edition. Mountain View: Davies-Black Publishing, 2007.



## PEER COACHING COMMITMENT

### **PEER COACHING PROGRAM FOR PUBLIC HEALTH LEADERS**

2007 – 2008 PILOT PROGRAM FOR ALUMNI SCHOLARS, YEARS 1 AND 2

This Commitment is to be completed and signed by Scholars who choose to participate in the GPPHLI Peer Coaching Pilot. Please initial each item below (at the right of the statement) if you agree:

- I completed the peer coaching training in September 2007 and commit to being an active participant in the program's remaining three components - practice, reflection, and assessment – through April 2008. \_\_\_\_\_
- I will meet with my peer coach/coachee by telephone or in person at least 8 times between November 2007 and April 2008. \_\_\_\_\_
- I will keep a confidential Coaching Progress Log throughout the duration of this pilot project. \_\_\_\_\_
- I will journal my experience, progress, and learning as a regular part of reflection.  
\_\_\_\_\_
- I will complete all required evaluation activities during the project. \_\_\_\_\_
- I understand that I am responsible for all costs associated with my peer coaching (e.g. communications, travel, etc) \_\_\_\_\_

PLEASE MATCH ME WITH ONE OF THE FOLLOWING SCHOLARS FOR PEER COACHING (*list up to 3 choices*): \_\_\_\_\_

PLEASE CHOOSE A PEER COACH FOR ME

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print or Type Name: \_\_\_\_\_

*Please return this form no later than October 12, 2007 to the GPPHLI Office via FAX 402.561.7525 or e-mail: blgrimm@unmc.edu.*



## *Peer Coaching Program for Public Health Leaders Progress Report #2*

Due: April 22, 2008

**Instructions:** Peer coaches agreed to participate in three parts of the pilot program: practice, reflection, and assessment. Progress reports capture your practice through reflection. The first progress report was unstructured and open ended. This one relies on a review of your Journaling and Progress Logs. It is intended to get you to think through where you've been, where you are, and where you are headed next.

This report has four steps. Here is a quick overview of what we are asking you to do and reflect upon:

- Step one: Refresh your understanding of peer coaching. Please review your Coaching Toolkit binder, Section II: Coaching Tools and Section III. B-F. Then reflect on your coaching experience.
- Step two: Capture your persistent barriers to successful peer coaching. Then identify what you most need next for peer coaching practice to be more effective and move ahead.
- Step three: Tell us a story about an insightful, energizing moment peer coaching has stimulated. Identify why it energized you, and how you used the insight to strengthen your leadership.
- Step four: If you have one, provide a peer coaching "AHA!" you have experienced during your peer coaching experience.

## **STEP ONE: READ AND REFLECT**

*Understanding and practicing the skills of feedback, mentoring and coaching is one of 24 core leadership competencies which anchor the Great Plains Public Health Leadership Institute's work. Our Institute is committed to life-long leadership learning among our graduating Scholars. After reviewing the general materials in your Toolkit binder, Sections II and III, consider the following:*

**A. Has the peer coaching you have been engaged in aligned with the principles and practices you were trained in last Fall? What has been most helpful to keep in mind as you practice coaching?**

**B. When you entered the peer coaching pilot program as a peer coach you agreed to:**

- Hold confidential all information shared in the course of peer coaching.
- Strive for an equal balance of being coach and coachee in our relationship.
- Be authentic as coach and coachee.
- Engage openly and honestly in the coaching.
- Share responsibility for designing a relationship that builds trust and depth.
- Prepare for coaching as coach and coachee.
- Respect each other's time by keeping appointments, being timely, and limiting external distractions while coaching.
- Keep the focus of our work in the realm of peer coaching rather than mentoring, consulting or therapy.
- Seek learning opportunities that flow from success and failure.

*How well have you been able to follow these agreements as a coach and coachee in the past 4-5 months?*

*C. When you began the peer coaching pilot program as a peer coach you committed to:*

- *Meet with your peer coach/coachee at least 8 times between November and April*
- *Keep a confidential Progress Log for the duration*
- *Journal your experience and learning.*

*How well have you been able to keep these commitments? What has worked best to enable you to fulfill your commitments?*

## **Step Two: Overcoming Barriers**

*It takes courage for a leader to identify and confront barriers, to put in place the personal strategies required to unleash the energy, innovation, and commitment to self-development. And it takes real leadership to bulldoze the barriers...But when the barriers come down, the result is a competitive, productive, and motivated workforce focused on the future. Morale soars, performance rises, and the organization is liberated to reach its highest potential. Seeking out the barriers demands high intelligence; doing something about them demands managerial courage (Hesselbein, 1997).*

- 1. Please identify up to three barriers you have experienced so far in the pilot peer coaching program.**
- 2. Describe briefly your strategies for overcoming these barriers**
- 3. What do you need –what would have helped you overcome these barriers?**

**Barrier #1:**

**Strategies:**

**“Needs:”**

**Barrier #2:**

**Strategies:**

**“Needs:”**

**Barrier #3:**

**Strategies:**

**“Needs:”**

### ***Step Three: Staying Energized***

*Please describe an insightful, energizing moment that the peer coaching program has given you. Why was it energizing? How did you transfer the learning into new leadership practice?*

### ***Step Four: Coaching “AHA!”***

*(If you have experienced one)*

*The biggest Leadership “AHA!” I have realized so far during this peer coaching experience is:*



## **PEER COACHING AGREEMENT**

### **PEER COACHING PROGRAM FOR PUBLIC HEALTH LEADERS**

2007 – 2008 PILOT PROGRAM FOR ALUMNI SCHOLARS, YEARS 1 AND 2

*This agreement is between:*

\_\_\_\_\_  
Name & \_\_\_\_\_  
Name

For the period of \_\_\_\_\_ through \_\_\_\_\_

We are committed to participating in the GPPHLI Peer Coaching Program, and to serving as peer coaches for one another. This document contains the agreements we are making with each other. As peer coaches, we agree to:

- Hold confidential all information shared in the course of peer coaching.
- Strive for an equal balance of being coach and coachee in our relationship.
- Be authentic as coach and coachee.
- Engage openly and honestly in the coaching.
- Share responsibility for designing a relationship that builds trust and depth.
- Prepare for coaching as coach and coachee.
- Respect each other's time by keeping appointments, being timely, and limiting external distractions while coaching.
- Keep the focus of our work in the realm of peer coaching rather than mentoring, consulting or therapy.
- Seek learning opportunities that flow from success and failure.

\_\_\_\_\_  
Name \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_  
Name \_\_\_\_\_ Date \_\_\_\_\_

(Please sign two originals – keep one for your files and return the other signed one to the GPPHLI office via FAX 402.561.7525 or e-mail: [blgrimm@unmc.edu](mailto:blgrimm@unmc.edu), by November 16, 2007)



## PEER COACHING WORKSHEET

### **PEER COACHING PROGRAM FOR PUBLIC HEALTH LEADERS**

2007 – 2008 PILOT PROGRAM FOR ALUMNI SCHOLARS, YEARS 1 AND 2

*This worksheet is intended to help you track the content of your coaching sessions, both when you are coaching and being coached. Complete one worksheet as Coachee in order to track your own progress and another worksheet as Coach in order to track your coachee's progress.*

Today's Date: \_\_\_\_\_  This is my Worksheet as Coachee  
 This is my Worksheet at Coach

*Focus of today's session, including any important insights:*

  
  
  
  
  
  
  
  
  

*Goals set or revised:*

  
  
  
  
  
  
  
  

*Commitments made, including intended action and dates for completion:*

Action	By When
--------	---------

_____	_____
_____	_____
_____	_____



## PEER COACHING PROGRESS LOG

### **PEER COACHING PROGRAM FOR PUBLIC HEALTH LEADERS**

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*This log is a confidential tool, for your eyes only, for tracking qualitative and quantitative data. At the end of each coaching session, review your Coaching Worksheets and distill key learnings here, both as Coach and Coachee. This log will also be a useful overview for completing intermittent progress reports and surveys.*

Meeting date and duration	As <u>coachee</u> , record your focus and any learning and action.	As <u>coach</u> , record your learning and insight for future coaching.



## PEER COACHING PROGRESS LOG

### **PEER COACHING PROGRAM FOR PUBLIC HEALTH LEADERS**

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*This log is a confidential tool, for your eyes only, for tracking qualitative and quantitative data. At the end of each coaching session, review your Coaching Worksheets and distill key learnings here, both as Coach and Coachee. This log will also be a useful overview for completing intermittent progress reports and surveys.*

Meeting date and duration	As <u>coachee</u> , record your focus and any learning and action.	As <u>coach</u> , record your learning and insight for future coaching.