



EMPath

Economic Mobility Pathways

COACHING OBSERVATION: A TOOL FOR SUPERVISORS



HOW TO USE THIS TOOL

The **Coaching Observation Tool** can help staff strengthen their skills and grow as coaches. Ideally, supervisors will use this tool to observe coaches as they interact with at least three different participants in any given calendar year.

As a supervisor, you may either bring this sheet when observing a meeting or complete the form immediately afterwards. (If you do the latter, it is advised to take notes to inform subsequent written feedback.) The following guidelines offer ideas about how to prepare for the observation, what to do during the process, and the post-observation follow-up.

Before the observation

- Schedule a meeting with staff at least one week in advance. Share the observation tool and talk through it, providing the explanation for the purpose of shadowing (it is not connected to job performance measures; purely a learning tool).
- Prior to observing participant and coach, the supervisor and coach(es) should talk with participants about the value of observation and the use of the tool to strengthen participants' goal-setting and program outcomes, and ask for their permission to observe the session.
- Set up a follow-up meeting (not to exceed one week) with observed staff and offer specific written and oral feedback.
- Shadow each coach two or three times annually.

During the observation

- Thank the participant and staff for letting you observe the meeting.
- Remind the participant of the purpose of your presence (continuous learning and not to observe the participant).
- As best you can, position yourself in room to be able to see both the coach and the participant.
- Use the observation tool checklist or take notes.

After the observation

- Meet with the staff that you shadowed. Explain the strengths that you observed, providing examples as well as areas for growth. Refer to your notes to give concrete examples of staff and participant conversation, body language, etc.
- If staff need to improve in an area of coaching, develop a training plan with concrete supports and set goals with deadlines.
- After two months, observe the staff again and look for improvements.

OBSERVATION TOOL: COACHING

Coach: _____ **Date:** _____

Observer: _____ **Meeting start time:** _____ **Meeting end time:** _____

Coaching <i>*the following is expected at every coaching meeting</i>			
During the meeting, the coach ...	Meets expectations	Needs improvement	Not observed
sets/uses an agenda collaboratively developed with participant			
asks participant for a brief update on areas of self-assessment tool			
(if this is the first meeting) introduces the self-assessment tool			
uses strengths-based language			
encourages a collaborative, rather than coach-driven, relationship			
takes participant's non-verbal cues into consideration and adjusts accordingly			
exhibits unconditional positive regard			
engages participant using motivational interviewing			
utilizes executive function-informed tools and strategies (mindful of office set-up, keeping track of time and agenda items, etc.)			
integrates trauma-informed approach			
maintains clear professional boundaries			
schedules a follow-up meeting with participant			

Comments on Coaching:

OBSERVATION TOOL: GOAL SETTING – INITIAL MEETING

Coach: _____ Date: _____

Observer: _____ Meeting start time: _____ Meeting end time: _____

Goal Setting Meeting – Initial Meeting			
During the meeting, the coach ...	Meets expectations	Needs improvement	Not observed
encourages participant to reflect on the self-assessment in order to set the stage for the goal setting process			
explains the purpose of goal setting and goal setting tool			
emphasizes that goal ideas and action steps come from the participant			
supports participant to identify and prioritize goals			
supports participants in writing a SMART goal and associated action steps			
encourages participant to identify supports and challenges to reach goals and action steps, and to develop strategies to overcome the challenges			
maintains a focus on goals even during moments of crisis			
treats goal setting as participant driven and mentor supported			
schedules a follow-up meeting with the participant			

Comments on Goal Setting (Initial) meeting:

OBSERVATION TOOL: GOAL SETTING – FOLLOW-UP MEETING

Coach: _____ Date: _____

Observer: _____ Meeting start time: _____ Meeting end time: _____

Goal Setting Meeting – Regular meeting			
During the meeting, the coach ...	Meets expectations	Needs improvement	Not observed
has an agenda and asks participants for their agenda items			
asks whether anything has changed for the participant since their last meeting			
asks participant about their goal progression and, if necessary, supports participant in revising the goal			
celebrates with participant when goals are accomplished and reflects on the process (challenges, resources, strengths)			
holds participant accountable for making progress on goals and on program outcomes			
schedules a follow-up meeting with participant			

Comments on Goal Setting (Follow-Up) meeting:

GLOSSARY

Unconditional Positive Regard (UPR)

The central hypothesis of this approach is that the individual has within himself or herself vast resources for self-understanding, for altering her or his self-concept, attitudes, and self-directed behavior—and that these resources can be tapped if only a definable environment of facilitative and mutual positive regard can be provided and sustained. As an approach, UPR helps participants accept and take responsibility for themselves. *As a coaching competency, UPR means that the coach/mentor has and shows overall acceptance of the participants by setting aside their own personal opinions and biases.*

Trauma-Informed Care (TIC)

Understanding the impact of trauma is an important first step in becoming a compassionate and supportive economic mobility community. The core principles of TIC are ensuring physical and emotional safety and trustworthiness, maintaining appropriate boundaries, and making tasks clear.

Motivational Interviewing (MI)

MI is a collaborative approach that seeks to elicit intrinsic and extrinsic motivation from the participant, builds a sense of agency, and maintains the belief in the capacity and potential for change. Economic mobility mentors believe that participants are experts of their lives and that with new tools, insights, and SMART goal setting processes, participants are capable of making and sustaining change.

Executive Functions (EF)

Executive Functions include basic cognitive processes such as attention control, impulse control, working memory, cognitive flexibility, reasoning, and problem solving. EF gradually develop and change across the lifespan of an individual, and can be improved at any time over the course of a person's life.