Mentoring, Coaching and Beyond in the Community Sector

A Resource by Pat Rosier for

New Zealand Federation of Voluntary Welfare Organisations

This resource is available at www.nzfvwo.org.nz/files/projects.htm#mentoring

Contents

Welcome

Mentoring is a really useful tool for supporting people in a range of roles in community and voluntary organisations. This resource pack is designed to assist facilitators, trainers and local groups in developing concepts and practices of mentoring in every day situations.

This resource grew out of work initially with Volunteer Wellington, and was then strongly supported by The NZ Federation of Voluntary Welfare Organisations. It is designed to bring the roles of mentoring and coaching into active use in the volunteer sector.

A pilot project was run with a group of managers in the sector in central Wellington. This involved nine sessions over a year, which are outlined in this resource package.

From this project it became evident that the roles of mentor and coach are valuable to managers in their regular work. The capacity of the sector is developed as much as by mangers working this way as by mentors and coaches who do this as the focus of their work.

A manager who has the skill and confidence to spend some time with others in their organisation building their confidence, for example by giving honest, direct, constructive feedback has a three-fold impact. They can improve that person's ability to do their job, as well as contribute to their personal development, and also increase the capacity of the organisation.

The abilities that make an effective mentor/coach can be applied among peers, within an organisation, with another organisation or individual – there are many possibilities. There is also a place for people who specialize in mentoring and coaching, both as practitioners and trainers. This resource is intended to contribute to all of these.

We hope it will be widely used, and welcome you to contact us with comments and ideas for its use.

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NZ Federation of
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1. Overview & Key Ideas

Purpose of the resource

- To build capability in the Community Sector, by establishing sound principles, key ideas and providing some tools for experienced practitioners to pass on knowledge and experience in constructive and developmental ways.

Using the resource

- The material is written on the assumption that anyone using it, either as a trainer or for themselves, has had considerable experience working in the not-for-profit sector, including in management roles.
- Some training for trainers is available to introduce this resource package for local groups, contact NZFVWO to discuss your interest.

Core ideas underlying the resource

Developing practice

This resource is designed not for 'learning about' being a mentor or coach, but to develop people's ability to be an effective mentor or coach. This is an important distinction that permeates all the information and activities.

All parties are learners

A mentor or coach will be learning from the mentoring/coaching process, which is a dialogue, not a situation where one person is 'passing on' and the other is 'receiving' knowledge and experience. The mentor/coach will have expertise, skills, tools, strategies to offer but is not 'the expert'. The person being mentored/coached will know more about their concerns in their position and is the best person to make decisions about what actions to take.

Responsibility

The person being mentored/coached is responsible for their own actions/ decisions even when they are a direct result of mentoring/coaching.

Mentoring/coaching is not for presenting a solution, but for going through a process that then enables the person being mentored/coached to take the next step.

Confidentiality and trust

Confidentiality and trust are essential to a mentoring/coaching relationship.

This is more than keeping information learnt in a mentoring/coaching session confidential, though that is certainly necessary. There is another level of confidentiality, which involves both parties keeping to themselves any judgements they may make about the other, good or bad.

These core ideas are reflected in all the session outlines and handouts.

To get the best out of this resource:

- engage with the ideas and activities
- treat others respectfully
- look out for others – in the group – after the group – if you are working in a group
- focus on what is real and actual, what you know and CAN know
- work at your learning edge
- be prepared to expand your practice in both process and content
- incorporate mentoring/coaching roles into your own daily work with others
- think about whether you can move towards doing mentoring/coaching with people in other organisations

Selection & Expectations of Participants

This is not training for being a manager in the not-for-profit sector, it is training for taking up the roles of coach or mentor, for using knowledge and experience gained in the sector to develop management capacities in others. Therefore participants will have:

- Worked in the not-for-profit sector in management roles
- A good understanding of the values and challenges in the sector
- Willingness to be a resource person in the sector

They will:

- Take part in practice activities within the group and report on and discuss their work
- Share knowledge and understandings with group members
- Maintain the highest level of confidentiality regarding personal and organisational information they learn within the group

Practice

In the session-outlines, practice is organised in threesomes. The ‘observer/adviser’ role can be dropped and the work done in pairs, but it does add a worthwhile dimension through reinforcing ideas of close attention, reflection and feedback. The makeup of threesomes is changed for each exercise, with people encouraged to practice more often with people they don’t work with in their workplace. The structure of the threesomes is:

A – the person being coached/mentored
B – the coach/mentor
C – the observer/adviser

- A behaves as her or himself in the given situation
- B behaves her or himself in the coach/mentor position.
- C watches the exchange, offers assistance to B if requested (eg, ‘I can’t think what to say here.’) and contributes observations to the discussion at the end of the exercise.

Structure of a practice exercise

First five minutes – person 1 takes A role, person 2 B role, person 3 C role. Begin the exercise with A stating the concern they will work with. After five minutes, change roles, and after another five change again; each person will have been in all the roles.

Last five minutes – general discussion among the three. What was it like in each role? What worked well from the A position. What didn't. And so on.

'Enactments' rather than 'role plays'

The practice exercises are referred to as exercises or as enactments rather than as 'role plays.' In role plays people take on another persona or an aspect of themselves. In the practice sessions in this resource — and practice is essential — people remain themselves. They are asked, as themselves, to enact various scenarios, which may be from their real experience or invented, and roles (person being coach, coach/mentor etc) but not to be someone else. Where a 'role' is called for, the trainer will take up that role – for example, if the trainer wants to set up an exchange between a manager and a 'scatty receptionist' the trainer will 'be' the scatty receptionist. This is an important distinction.

2. Core Training Sessions

General information for trainers

Each session is designed to be one and a half to two hours.

Groups can have four to twelve participants. A smaller group requires strong commitment from all its participants to attend every session. Eight is a good number of people for a group. If there are as many as twelve participants, sessions may need to be longer than two hours.

They are designed to be workshops where everyone engages with the material and takes part in discussions and activities.

The session notes assume that trainers have some knowledge of adult education and will use a variety of means of presentation, discussion and practice, drawing on the knowledge and experience of participants and encouraging them to interact with each other.

Remember that participants will be experienced workers/managers in the not-for-profit sector and will have a lot to contribute.

People should know in advance that they will be expected to practice the roles of coach/mentor within the group during later sessions.

The handouts referred to are in a separate file, called Handouts.

Session 1: Introductions and Context
Handouts: 1 [give out at end]

	NOTES FOR TRAINER
Trainer introduces self.	Talk about your background in the nfp sector, as a trainer, how you came to be using this package and add one aspect of your more personal life.
Group members introduce themselves.	There are many tools for this. A simple self-introduction focusing on what brought each person to this training and a reference to their expectations would be useful.
The social, economic and political context of the nfp sector. At any given time nfp organisations are working in a political (expressed through the actions and statements of central and local government) context with which they may or may not agree. Attitudes to volunteering, availability of and constraints on funding, accountability requirements from funders, all of these arise from this context. Discuss these with participants, especially how they effect their organisations, how they have seen changes over the years. Current legislation that affects the sector (the Charities Act, for example) could also be noted.	The relevance of this to mentoring/coaching concerns the mentor/coach's ability to keep a realistic eye on what is 'given' in the big picture and to help develop strategies for working with this rather than 'tilting at windmills'.
Organisations in the nfp sector – special characteristics. • Volunteer boards and volunteer workers, at times with the same people in both roles. • A manager (or coordinator, director etc) is often the paid professional working with both sets of volunteers. • Managers' roles are often wide-ranging and multi-faceted, including	This is an important aspect of the context a mentor/coach will be encouraging the person they are working with to understand and work with strategically.

dealing with daily detail and negotiating with policy-makers and high-level executives. • Raising funds is often a key and ongoing concern. • Pay rates tend to be low, particularly given the complex nature of most manager positions.	Issues around governance and management are covered in a later session.
What is mentoring? "… a relationship with a trusted advisor, to promote on-going learning and provide support for people in their workplaces." From 'Mentoring: Help when you need it', produced by NZFVWO	Handout 1 includes some ideas and information about mentoring/coaching, including among peers. There are many books on these subjects. The intention is not to produce definitive theories but to develop people who wish to learn how to *be* a mentor, in their regular work and, possibly, as a specialty.
Reflection **Handout 1** – some background ideas on mentoring and coaching Personal – What do I do now in my work that comes within the roles of mentoring/coaching?	This can be given as 'homework' and will form the basis of the beginning of the next session. Trainers may wish to add their own resources.

Session 2: The nature of mentoring/coaching & not leaping to solutions **Handouts: 2, 3**	
	NOTES FOR TRAINER
Begin the session with a check-in where people may comment briefly on the reflection material from the previous session.	Note themes, concerns that could be further developed when everyone has checked in.
What do I do now that could be called mentoring/coaching? Remind people of this reflection question. Get responses.	Establish that everyone will have some relevant roles, and over these sessions will build on those. Have people note for themselves what they do now, and a couple of areas where they would like to develop.
Handout 2 page 1 The page 1 'map' identifies the kind of behaviours that effective managers use.	Have people look at this in pairs and identify their own strengths and areas for development among the examples. Can they suggest any others that should be included. (The diagram is not intended to be exhaustive.)
Handout 2 page 2 This page identifies some of the important attributes and behaviours that are necessary for productive mentoring/coaching. Group members to work in small groups on one or two of the items and present to the whole group their ideas regarding how they would go about putting the item/s into practice.	Have participants relate these abilities to their own practice and identify those they feel confident with and those they would like to develop further.
Handout 3 Introducing the idea of not 'leaping to solutions'. Discuss the handout, which illustrates moving from telling the person what to do to teasing out what the person is doing and encouraging them to come up with ideas about how to proceed.	The process of the person being coached describing the situation and teasing out the presenting and underlying factors is critical to the person working out for themselves, in the conversation, what THEIR next step/s can be.

Practice Divide the group into threes. Use either the scenario in the handout or one from the group and have each person in a group of 3 take a turn at being coach, person being coached, and observer/advisor and work with an example, focusing on NOT giving solutions. (It's a natural tendency to want to be helpful by offering solutions, so they have to work against this.)	Offering a solution shuts off this process. Making suggestions (Had you thought of …?) is good, but people need to practise leaving the space for the coachee to come up with ideas so they see how effective it is before being encouraged to contribute ideas.
Reflection What are some questions for encouraging analysis and constructive thinking. Make a list. Not leaping to solutions should be a recurring theme during subsequent sessions.	Questions need to be open ended and exploratory. There are hundreds of possibilities. Here are a few samples What do you think about that now? What would you rather have done? Tell me more about that.

Session 3: Think structurally & strategically

Handouts: 4

	NOTES FOR TRAINER
Begin the session with a check-in and with lists of potential questions.	If the questions are good enough they could be combined into a group resource.
Present the idea of thinking structurally and strategically as well as dealing with the presenting concern. For example, due to understaffing you have to relieve on the desk and phones over the lunch hour which seriously interferes with you doing your own job. Ask these questions: - is this the best (only?) thing to do right now? - what other possibilities are there for the longer term? - who is affected besides me? can they be involved in figuring out a better way to do this? - is the process by which we are dealing with this the best one for the outcome I/we are seeking?	The 1st question deals with the immediate concern. The 2nd question deals with the presenting concern in the longer term. The 3rd and 4th questions move into strategic/structural thinking. A mentor/coach is more useful if they develop the habit of moving into the 3rd and 4th modes as well as encouraging the coachee to find ways to deal with the 1st and 2nd.
Practice Set up threes or pairs and have participants practice this as well as retaining the not leaping to solutions idea. Practise on real examples from participants. Change groups around so participants work with different people.	Trainer can usefully move about small groups offering assistance and encouragement. modeling what participants are practicing.
Handout 4 Use examples, discussion, to develop these ideas. Develop the idea of making suggestions that are not solutions. What do you think about? In a similar situation I …… what do you think about trying that?	It can be useful for the trainer to take on the role of Chris and make up responses as s/he goes, with the whole group taking up the coaching role and asking questions, leading the discussion.

What do you think you could do in the situation that involves trying something new? And so on.	
Reflection Feedback is a basic need at work– we all need to know we are doing an okay job. Think of an example from your experience of feedback that you appreciated – what were its main features.	These opportunities for reflection are an important aspect of integrating the training with participants' practice.

Session 4: Feedback, feedback, feedback **Handouts: <u>5</u>**	
	NOTES FOR TRAINER
Check-in, including feedback examples.	Draw out the features that made feedback effective.
What stops people giving feedback? Discuss this in depth. Encourage participants to see where they themselves avoid giving direct feedback. Consider ways to overcome this.	mentors/coaches need to be alert for opportunities to help people overcome their inhibitions about giving honest feedback when someone is not doing an adequate job.
<u>Handout 5</u> Giving and receiving feedback. Engage the group with the ideas in the handout – enactments, discussion, small groups, examples ……Take enough time.	Use any technique you are comfortable with to ensure that participants grasp the idea that it is behaviour, not personality, that is the issue.
Practice Use threesomes. People may work with their own examples or any of the following: • A volunteer is clearly unsuitable for the work they are doing. • You suspect a paid worker is taking small amounts of money from the petty cash • A committee member who also does roster duties regularly tells you how you should do your job. • You've been told by your committee to change your data package and you don't think there's anything wrong with the present one. • The two other paid workers — both part-time , one does the admin, the other maintains the computer, data etc — are seriously not getting on. • When you present your monthly report to the committee you get no feedback, you have no idea what the committee thinks about what you do.	Set up the threesomes with A as the worker (who has the problem) B as the coach and C as the advisor, with each person taking a turn at each role. Remind participants that they are practicing in the three areas covered so far – not rushing to give solutions, thinking structurally and strategically, giving direct feedback (and B coaching A in these, particularly the feedback). During discussion after the enactments, encourage participants to think about what it felt like to be in the A position. If the group is very inhibited about doing enactments the trainer may take up the A

	position and have the whole group take the B and C positions for an example.
Reflection What are participants feeling confident about taking into their own practice, both in their jobs and potentially in mentor/coach roles? What are they feeling diffident about?	

<table>
<tr><td colspan="2">Session 5: A three-stage approach
Handouts: <u>6</u></td></tr>
<tr><td></td><td>NOTES FOR TRAINER</td></tr>
<tr><td>Check-in. What's seeming difficult? (From the reflection.)</td><td>An opportunity for planning the later sessions around concerns of participants relating to practice.</td></tr>
<tr><td><u>Handout 6</u>
The key is to practice . There's not a lot to discuss in this essentially simple idea. It is important because it begins to give a way forward in any situation.
I observe/think/feel …
What do you observe/think/feel?
How can we work together to move this forward?
Have participants work in threes on situations from their present working life.

This session should be spent mainly on practice and discussing the practice, what's easy, what's not, how are people doing with thinking structurally etc

Another three-pronged approach that can be useful in challenging situations is:
feel (your own response, the vision & values you are working with)
think (structurally, strategically, analytically)
act (thoughtfully, with regard to process and outcomes)</td><td>One key is to focus on the issues and express them specifically, (refer Feedback notes)

Another key is to do this with goodwill and generous intent – you must really want to improve the situation, not use it for other purposes.

All practice should include reminders of the previous key ideas.</td></tr>
<tr><td>Reflection
What would you need to talk about at the beginning of a new coaching/mentoring relationship?</td><td></td></tr>
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Session 6: Beginnings

	NOTES FOR TRAINER
A. Beginning a new mentoring/coaching relationship A written contract or not? Either can work well. People inexperienced in either role are advised to do written contracts. If there is a written contract, what would be in it (no more than half an A4 page) Working in threes construct a written contract that would work for one of you. Then discuss the question, how would you go about setting up a contract? In different threes have the conversation that might lead to a contract, each taking a turn in each role. Discussion: In what circumstances might a contract not be needed? *B. Beginning a session* Brainstorm – some good openers for the mentor/coach. Practice: In threes. Have an initial conversation between mentor and protégée for no more than five minutes, then a three-way discussion about what the focus of the session might be. Each person to take up each role in turn. Brainstorm ideas for what to do if protégé says they don't have anything for the session. (Don't forget referring back to the goals and evaluating whether these are being achieved, need revision and so on.)	A contract would sensibly include: frequency of meeting; cost; who pays if that's relevant (individual or employer — usually the latter); goals; period of review; ending the mentoring/coaching. A good process for setting up a contract: 1. an initial meeting 2. discussion about confidentiality, meeting times, purpose, goals, with the mentor/ coach taking notes 3. mentor/coach writes up the notes and sends to the other person 4. if they both agree sign and have a copy each and begin sessions at next meeting Open-ended questions – like, 'How has it been going?' Mentor/Coach will scan for voice tone, body language that indicates concerns as well as attending to stated concern. A few minutes into the conversation mentor/coach will have an idea of the focus of the session — as well as being prepared for that to change. Look for or feed in ideas like: - What has been challenging for you this year? - Do you have a sense of where you want to develop your expertise/skills? - What's your satisfaction level in this position? - Have you noticed how much you have

	developed your ability to, eg, deal with conflict. What do you see yourself doing differently. It's an opportunity to look at the bigger picture for the person in their position and their future planning for their own development.
Reflection What about endings, for both relationships and sessions? Bring back one idea for each to the next session	

<table>
<tr><th colspan="2">Session 7: Endings
Handouts: <u>7</u> – [given out at end of session for ‘reflection’]</th></tr>
<tr><th></th><th>NOTES FOR TRAINER</th></tr>
<tr><td>A. Ending a session
Mentor/coach does a summing up – might be only a couple of sentences.
Protégé says what they will take away from the session.
Arrangements made for next session.

Make sure that protégé remains clear that responsibility for an (in)actions outside the session is theirs. Mentor/coach makes sure she or he is not invested in the protégé taking up any of her or his suggestions.

Practice, using the following scenario first, then scenarios from among the threes; Near the end of a session Joyce, protégé, says to Doreen, mentor, ‘Would you ring me next week to check that I have actually confronted Alison about her lateness? I might lose my nerve otherwise.’

Discuss responses to set scenario in whole group.

B. Ending a mentoring/coaching relationship
Discuss in full group:
In what circumstances might a relationship end?

Regardless of the reason, the mentor/coach is responsible for making every effort to make it a satisfactory ending if at all possible.
Have a final review session – what each person has gained, maybe some hopes or goals for the future
A clear, honest statement from the mentor/coach is essential.
For example, ‘I’ve seen you really develop your confidence in managing staff and have really valued playing a part in that. I wish you all the best.’</td><td>Emphasise the importance of the protégé going away with at least one idea of something constructive they can do. Remind them of it if it came up early in the session.

Make sure the following come out:
Joyce’s use of the word ‘confront’ suggests she may not have taken on board the three-stage process for raising issues in session 5 – what can Doreen do about this?
It is not appropriate for Doreen to take responsibility for Joyce raising the issue with Alison. She could suggest that Joyce might talk about what she has or hasn’t done at the next session.

One person changing job, leaving town etc
A preset time frame having reached its end.
One person having a sense that they have contributed or received as much as they are going to from the relationship.
The protégé’s needs have changed, they now need a different sort of input.
The protégé finds the mentor/coach too challenging. And so on.</td></tr>
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Remember, it's for the mentor/coach to be honest and generous and to leave their own ego out of it! Practice in threes. ***Reflection*** Give out **<u>handout 7</u>**. Apportion pages of the handout to individuals to read and present main points of to group at the next session	

Session 8: Review **Making coaching/mentoring relationships work**	
	NOTES FOR TRAINER
Check-in, with input from reflection on starting a mentoring/coaching relationship.	
Spend at least half of the session in practice, working with things that come up from the review. Finish with a reiteration of the idea from the Introduction in the Overview, that most of them will incorporate mentoring and coaching roles into their management and what this will mean in practice.	Trainer will need to be familiar with material and have noted points that need bringing out. Keep it lively. Emphasise that for a person with management responsibilities a proportion of their time is *best* spent in proactive management – that is, using mentoring and coaching roles to support and develop the people they are working with.

Subsequent sessions	
Eight sessions is often a good number. Some of the sessions here may occur over two time slots. Concerns that have come up in the group can be returned to or covered. Some of the issues that come up often in coaching may be covered in more detail, for example, - working with a volunteer committee - dealing with difficult people - negotiating salary and conditions on one's own behalf - getting feedback, support etc from management committee - employment practices	

3. Handouts

All handouts are available only as PDFs. Click on the items below to download.

1 **Background**

2 **Working Constructively (i)**

Exploring, reflecting, summarising (ii)

3 **Solutions - or not**

4 **Structural thinking**

5 **Feedback**

6 **A three stage approach**

7 **Workplace coaching**

Mentoring Coaching and Beyond

Handout 1
Background materials

Notes from "Dialogic Mentoring" in Management Communication Quarterly, Nov 2000 by R Michael Bokeno and Vernon W Gantt

The authors conclude that there are two keys to beneficial mentoring:

1. An equitable relationship between the two parties, where each has a valid voice.
2. An ability to 'maintain contradiction as an irreducible property of learning' rather than seek easy solutions.

The best ('dialogic' in the authors' words) mentoring relationships seek and depend on:

(a) A genuine care and respect for the other in interaction;
(b) The ability and willingness to engage in reflection, both individually and collectively; and,
(c) The ability and willingness to speak authentically of one's thoughts and ideas and assumptions.

The central issue in learning is to become a practitioner rather than learning about practice. The key is relationships that assist reflection and bringing in new ideas.

The best mentoring is an ongoing, long-term process of mutual growth and exploration.

Mentoring is a form of adult learning and professional development.

Issues

Power can be an issue in mentoring relationships. Where is exists it should not be ignored but worked through.

The emphasis must be on the processes of changing and learning rather than on 'outcomes'.

The best mentoring practices are situated around real issues on real time in real organisational circumstances.

From "Mentoring as a tool of the modern learning organisation" by Andre Smith and Don McMurray in Adult Learning Cultures: Challenges and choices in times of change Edited by Nick Zepke, Michelle Knight, Linda Leach and Alison Viskovic WP Press, Wellington, 1999

Mentoring was recognised in Greek mythology as a mutually beneficial means of developing people.

There is a continuum of mentoring-style relationships;
Peer supporter – coach – teacher – guide – sponsor – mentor.

A mentor 'not only guides and consults with the mentoree but is someone who also assists the mentoree to build self-confidence, to better relate to the work environment, colleagues and trainers, and, most importantly, helps them to develop a willingness to change'.

Mentoring in the past has been seen as enabling a junior employee to follow the path of a senior one, to be a pairing of a more skilled or experienced person with a less skilled or experienced one, with the agreed upon goal of having the lesser skilled person grow and develop specific competencies – often these mirror those of the more senior person.

The aim of a mentor is to facilitate growth in the mentoree rather than to pass on the lessons from their own experience.

Mentors are not normally the immediate supervisor of the mentoree.

A transformational mentoring model
The mentoree assumes ownership of what the mentor has to offer, such that the mentoree is empowered in an environment where they can become self-reliant and develop a healthy and integrated perception of their own self-worth. The mentoree has responsibility for initiating the discussion and for ensuring the outcome.. The goal is mutual growth.

With transformational learning mentorees both change their perspective and have an awareness of the process they are using to make the change. The mentoree plays an equal part in what is happening so that the mentor and mentoree work in partnership to increase the mentoree's openness to learning. It is impossible to facilitate transformational learning in someone else without accepting that we will learn from that person too.

Notes on Peer support and coaching, culled from a range of written sources ***Pat Rosier, March 2004***

Learning among peers requires people to be able to deal with different points of view that may be contradictory, and to actively listen to each other.

The best conditions for learning among peers involve

(a) A genuine care and respect for the other person;
(b) An ability and willingness to engage in reflection, both individually and collectively; and,
(c) An ability and willingness to speak authentically of one's thoughts and ideas and assumptions.

In peer support and coaching people work together to explore events, experiences and difficulties in real rather than contrived-for-training situations.

People become practitioners as distinct from learning about practice

There is the potential for all parties to reach a place, whether that is a decision, a plan or a strategy, that neither could have reached individually.

The best entry to new learning is a stance that there is something I don't already know, with a mutual openness to learn. Through interactions we don't merely receive information, but revise the way we see something. Revising the way we see something requires the existence of and exposure to alternative and even opposed perceptions.

There are better things to do with contradictions than resolve them; there is much more to explore in dealing with contradictory views than in the collapse of one or the compromise of both. Full exploration involves a focused pursuit of openness in the sense of ongoing communication that is not and cannot be finalised. This requires equity of voice, that is, the talk of one carries no special privilege, except perhaps specialist knowledge or an ability to frame questions that deepen exploration.

It can assist the above for people to deliberately put themselves alongside people, business segments and viewpoints unlike those with which they are familiar and secure.

Issues

Power /politics/influence
These are ethical concerns that must be talked about.

Confidentiality
Peer support and coaching relationships should have clear guidelines, especially, but not only, if those concerned are in the same organization.. There is not a 'one size fits all' arrangement. Clarity of mutual expectations and limits is important.

Mentoring Coaching and Beyond

Handout 2 (i)
Working constructively

getting people involved in new ideas and change at and early stage (rather than presenting something new the day people are expected to put it into practice)

being specific and concrete (rather than talking in generalities)

Eg.,' I want to talk about getting meetings started on time', rather than 'Your unreliability is a problem.'

keeping the focus on issues (rather than personalities)

identifying what works well and building on it (rather than always focusing on what has gone wrong)

working with conflict to find a constructive outcome for everyone (rather than looking for a quick 'solution')

Giving timely, honest feedback (rather than putting it off until a problem has a long history or has created a crisis)

WORKING CONSTRUCTIVELY WITHIN A GROUP SO EVERYONE CAN DO THE WORK OF THE GROUP

being clear about roles, expectations and limits for yourself and others (rather than 'rescuing' people

acknowledging history and moving on, in the light of the knowledge and experience (rather than trying to ignore it and/or becoming bogged down in it)

working alongside people (rather than being the 'expert' who knows everything)

keeping policy (governance) and oper-ational (management) roles clear via a planning and budget process (rather than doing most things in crisis conditions)

communicating appropriately (rather than assuming everyone needs to know either everything or nothing.

construct: make by fitting parts together; build, form

link ideas (theory) and practice (what you <u>do)</u>

Mentoring Coaching and Beyond

Handout 2 (ii)
Exploring, Reflecting, Summarising

This is the basic coaching/mentoring tool. It requires close attention by the coach/mentor to what is being said, body language, facial expression, voice tone and general demeanour. It feeds back to the person being coached/ mentored information from outside of themselves that they may not have been aware of or may have seen differently. Feeding back also provides opportunities for the coach/ mentor to correct any misunderstandings.

It is expressed in comments like —

> I noticed that your energy level lifted (or diminished) when you were talking about …[giving information a person may not have noticed themselves]
>
> I'm not sure how important …… is to you. [checking understanding]
>
> Can you say some more about that? [developing specificity]

… and many more. Notice they are open-ended, seeking as well as giving information.

Each participant will develop their own style and repertoire of comments.

Mentoring Coaching and Beyond

Handout 3
Solutions – or not

Scenario
In a mentoring/coaching session where you are the mentor/coach, Jo says she is having increasing difficulty doing her job in the hours she is paid, there's more and more work to do and she's increasingly working evenings and weekends …'

Response A
Mentor/coach: You have to be disciplined. Prioritise your week and your day and make sure you do the most important things.

Response B
M/C: When I found myself in a similar situation I set up a weekly diary – here, I'll show you — and followed it rigidly until the pressure came off.

Response C
M/C: Okay, let's approach this from two angles — whether your own work habits could be made more efficient, and whether there is simply too much work and you need to be negotiating around your job description.

Response D
M/C:
Do you see any pattern, any stress points over a month or a year?
Has this come on gradually, or is it a sudden sense of overwork?
What's your organization of things like email and paperwork like? Do you need to work on that?
What do you think is going on?
Has the amount of meetings increased?

Response E
M/C: What do you think is going on?
Describe a recent week?
How closely does what you are doing relate to your job description (when was this last reviewed?)
What do you see as the main issues?
What hours would you like to be working?
What parts of your job do you get greatest satisfaction from?

For D and E the nature of the questions as the discussion goes on will be determined by the answers.

Mentoring Coaching and Beyond

Handout 4
Structural Thinking

- the presenting problem – immediate need
- the presenting problem – longterm need
- the presenting problem – how does it relate to the person/ organization/ overall? does the structure of the organization contribute to the problem? does the problem relate to the overall social, political and economic context

Strategic thinking arises from the third point.

- are there training needs? relationship problems within the organization that effect the problem?
- is there an anomaly in the organizational structure that needs remedy?
- is there a need for political lobbying?
- is there anything underlying the presenting problem

An example:

Chris is feeling undervalued, has no idea whether he/she is doing a good enough job or not.

- ask for some feedback
- is there a regular appraisal system in the organisation?
- is there anyone undermining Chris?
- is the management group skilled in being a good employer?
- does the organization need some employment policies?
- what if a management group member had gone for the job and thought they should have got it?

Work with this – or another example from a group member's experience – and tease out the presenting, structural, strategic issues that need attending to. It may be a simple matter of asking for some feedback, which no one thought to give because everything is going fine or it may be highly complex.

In practicing, make it complex enough to give something to work with.

Remember, the coach/mentor is not offering solutions.

Mentoring Coaching and Beyond

Handout 5
Feedback

Giving genuine, accurate, specific, positive feedback is the oil in a smooth-running, effective, efficient working group.

Giving positive feedback

1. Make it immediate

Examples: ‘Great job’, ‘I appreciate you staying back to finish that outline’, ‘We gave that one hundred percent, thanks for your work and support,’ ‘Thank you for supporting me in the meeting’. These are all good things to say immediately..

2. Make it specific

‘Good work,’ is fine. ‘I appreciate you holding the fort when I was late,’ ‘I appreciate the trouble you take to meet records deadlines,’ are better because they identify and reinforce exactly what you are appreciating. Specific, accurate, positive feedback is an excellent way to acknowledge competence. It is easy to take for granted people who do their jobs competently and reliably.

3. Give it directly to the person concerned

Some people need a little coaching to accept positive feedback. Sometimes you might repeat the comment if it is brushed aside, and say something like, ‘Did you hear that? You really did do a good job.’

4. Make it accurate

Don’t flannel, tell the truth. Don’t get sarcastic, for example in saying, ‘It’s good to see you here on time,’ (and the tone of voice produces the sarcasm) when you really want to say, ‘This is the first time this week you have been on time.’ If you do not have a genuine appreciative comment to make don’t make one.

5. Make it constructive

Encourage further development. As in ‘Would you like to have some time to show the others some of what you do?’ or ‘Had you ever thought about training others in this?’ Do avoid a situation, though, where every time someone is told they have done a good job they are given more work.

6. Feedback should be focused on the issues

‘You are the best worker in the team,’ sets up a competitive environment. ‘That was a tremendous solution you found to the roster problem for next week,’ acknowledges the accomplishment without setting up comparisons and judgements.

Receiving positive feedback

It is very discouraging to have someone respond to a positive comment about their work with a brush-off like, ‘Oh, it was nothing, I always do that’. People will stop giving it. Allow yourself to really hear the feedback. Respond - look at the person and respond. A simple ‘thank you’ is often enough. Let the person know you have heard the feedback and you are pleased to have it. Try, ‘I’m glad it worked well, and thank you for telling me.’

Giving critical feedback

People go to extraordinary lengths to avoid giving critical feedback. It takes courage. And the problem almost never goes away if it is ignored.

1. Make it immediate

That is, as soon after a concern has arisen as is practicable. Privacy is almost always best.

Handout 3, page 2

2. Make it specific

Criticism is most useful when it identifies something a person <u>does</u> and asks for that to change. Don’t say, ‘Your attitude to your work has deteriorated’, say, ‘The work I ask you to do is taking longer and longer to get done. I want to talk about this.’ The more clearly you describe the behaviour you want someone else to change the more likely it is that change will happen.

One way to do this is to change an impression, such ‘John is so rude!’ to a description of behaviour, such as, ‘John talks over the top of me and looks over my shoulder when I do get to say something.’ It is easy to do this if you ask yourself the question, ‘What does John <u>do</u> that gives me the impression he is rude?’

3. Be direct

Talk to the person(s) concerned, not everyone else. Be as direct as possible. make your comments specific to the work and avoid saying things about the personality or personal habits of the individual.

4. *Be accurate*.

Check out your information and perceptions. Don’t treat hearsay information as ‘the truth’ - terrible mistakes get made when this is done. Say, ‘I can feel the tension in the air, tell me what you think is going on?’ Always ask the person complained about for their perception of the concern.

5. Be constructive

Have some ideas for remedies to the situation without closing your mind to what others might suggest. Approach a person you have a concern with from a partnership perspective. ‘There is this problem, how can we deal with it?’

6. Confront the issues not the person.

Say, ‘Three people have complained about the office being closed early. We advertise opening hours and must stick to them.’ Don’t say, ‘Your unreliability is making things difficult.’ Always describe the behaviour rather than labelling the person. Even when the person you are giving feedback to personalises the discussion you can stay focussed on the issues.

Receiving critical feedback

It is very easy to go onto the defensive when hearing critical feedback; often strong emotions arise. In this situation it is very useful to remind yourself to give attention to what is being said and to think. The feelings are real and need to be given attention but in the immediate situation thinking is what is needed.

Listen with full attention to what the person is saying. This is of course much easier if they are following the guidelines above for giving feedback. Even if they are not, listen to what is being said.
Check that you both have the same understanding of the issues. Say, 'So you are telling me that clients are complaining about a delays in getting back to them'.
Evaluate what has been said and correct if necessary. 'I agree that there was a delay with the Napier group, however in regard to the situation in Hastings, I see it quite differently….'.
Seek a constructive outcome. eg., 'So, you want a turnaround time of two days on regional orders. I have been prioritising the big local job. Can we talk about how to do both? It could mean extra staffing'
Handout 3, page 3

Some additional points

Staying focused on the issues
The whole area of giving and receiving feedback is rather like trying to perform a play without knowing the script; you have no idea what response you will get from the other person and they may try and change the plot. It is really common when someone hears something they find difficult for them to attack the mode of delivery.

What if the behaviour doesn't change, or there is 'slippage'?
Go back to records of the initial exchange. Remind. Insist. Spell out consequences and make them happen. There is a point in every instance when lack of change in unacceptable behaviour after constructive opportunities for change are created, becomes a serious issue, whatever the original behaviour.

***People crave, and deserve, feedback*.** In most cases it will be received in the spirit in which it is offered. It is important that defensive or upset reactions do not stop accurate, issues-based feedback from happening.

We cannot 'make' someone change. We certainly, and rightly, cannot change a colleague's personality. We can ask people at work to change specific aspects of their behaviour if their own or others' work or working environment is affected. The chances of change occurring are far greater if we go about asking for it in the ways suggested in this chapter.

Mentoring Coaching and Beyond

Handout 6
A three stage approach for dealing with an issue

Stage One: make a statement about what you experience
Stage Two: get a response from the other person
Stage Three work together to move the situation forward

Example: *A committee member, Mona, who also does roster duties regularly tells you should be doing your job.*

Stage One: Making a statement. (Focus on the issue – use the feedback resource)
Mona, you just suggested that I should be finishing the monthly report for tonight's meeting instead of spending time with the new volunteer. I'll have that report done in time and I prioritise spending time with new volunteers. I get the feeling that you think you need to help me figure out how to do my job.

Stage Two: How do you see it?

Stage Three: Can we talk about how to keep the committee responsibilities and the task volunteer roles separate?

Of course, how the conversation progresses in Stages Two and Three will depend on the response to Stage One. It may take more than one attempt to get to Stage Three. Mona may be offended. In this case you might say something like, 'I'm sorry if you are offended, Mona, but I really need to sort this. Can we talk about it another time, perhaps.' And don't let it drop.

This three stage process can be applied in almost any situation.

1. This is what I see happening
2. What do you see happening?
3. How can we work together to move this on?

Mentoring Coaching and Beyond

Handout 7
Workplace Coaching
(includes mentoring)

WORKPLACE COACHING (INCLUDES MENTORING)

Based on Chapter 6 of *Workwise:A NewZealand guide to managing workplace relationships,* Pat Rosier, 2003, CUP.

The phrase ‘workplace coaching’ usually refers to situations where a person has a coach from outside their workplace. Being such a coach requires knowledge of and experience in organisational systems and, workplace relationships. It is not always necessary to have worked in an area in order to coach someone who does. In this circumstance, however, it is important to always checkout assumptions as well as making sure that coach and client have a shared value base in relation to the work of the client.
`Workplace coaching is about development and effectiveness but is not to do entirely with meeting the needs of a client. It can be professional development for new managers or for managers who want to develop specific abilities Here is a list of possible purposes for workplace coaching::

- To provide a confidential place where the person being coached can talk about work concerns.
- To provide support and a sounding board.
- To contribute to the person’s understanding and insight of their own motivation, purposes and performance.
- To assist people to develop a repertoire of strategies for dealing constructively with workplace concerns.
- To assist people to make sensible career decisions.
- In some cases, to monitor the employment practices of the employer.

The purposes listed place workplace coaching clearly in the training and professional development budget for many organisations. Sessions are best conducted away from the workplace, for several reasons;

- Freedom from interruptions.
- Privacy.
- The value of a separate reflection space.

Ideally, sessions are paid for by the employer of the person seeking coaching. However payment is arranged, and that must be clear before any sessions begin, the coaching is purely formative undertaking; the coach/supervisor has no structural authority in the person’s workplace and no direct influence on their promotion or salary.

There has been limited formal training for this kind of workplace coaching, so who gets to be coach? Mostly people with a broad-based working experience and developed skills in training. Some coaches have management training as well as experience. A few workshops and courses for coaching are beginning to appear and there will be more as this kind of professional development spreads. Mentoring can have some elements of coaching and there are possibilities to explore in the area of peer coaching, within large organisations or across smaller ones.

Confidentiality and ethics

The content of workplace coaching sessions is of course confidential. Confidentiality regarding the identity of people a coach works with is also necessary. Ethically, the client in a coaching relationship can reveal the fact of the relationship and talk about what goes on in sessions, while the coach cannot use any of the information gained in coaching sessions in any other place.

When a workplace is paying the fee for an external coach they will know of the coaching relationship and may ask the coach to sign a contract with them. Such a contract should specify only the frequency of the sessions, the cost and the confidentiality of any information about the workplace.

Occasionally a workplace will ask for a report of some kind on the coaching. This is a reasonable request if they are paying for the sessions. There must be some clear rules for this for the person being coached to get maximum value from the sessions.

- If the workplace is paying for the sessions they are entitled to a list of the dates and times of sessions on request. (These will be obvious from payment invoices; however, some employers like an annual list.)
- A coach should not discuss any person they have coached on the phone.
- A coach should discuss the content of the coaching only in the presence of the person being coached.
- If a written report is requested it should be provided after consultation with the person being coached and with their prior knowledge of its contents.

A coach is working for the person she or he is coaching and therefore they are entitled to know first anything that might be said arising from sessions. This does not mean that a coach cannot include in a written report comments that the client did not wish to be included, but that the client must know this in advance. If there is strong disagreement the client could add their own views. It is essential that any reporting be both truthful and not contain any surprises for the person being coached. In fact, employers seldom ask for reports.

In most situations the only information the coach has to work with comes from the person they are coaching. There are some risks in this and a coach will always have to exercise judgement in relation to the validity and completeness of the information.

Scenario 22

Huria was an outside coach/supervisor for Al, who managed 16 staff in a health service provider. After about four sessions she was uneasy about the information she was getting from Al, there were some inconsistencies and she thought there might be some important items left out. She asked Al to bring various documents to the next meeting so they could look at them together.

There were several inconsistencies with what Al had told her and she pointed these out, saying ‘It says in this document that this is the case, and I remember you telling me something else in the last session.’ The third time this happened Al gathered up all the papers he had brought and said ‘I thought you were supposed to support me, not show me up.’ The conversation continued like this:

Huria: Yes, it is my job to support and coach you and I can do that best if I have accurate information. I asked you to bring these documents so I could check out my suspicion that I wasn't getting all the information. As soon as I was certain I pointed it out to you.
Al: So what now, do I get a smack on the hand?
H: No I am interested to know more about your reasons for not giving me the full picture, so we can work together on real issues.
A: What if I said I am scared I'm not up to the job, that his promotion was a mistake.
H: Then we could look at the job as a whole, what you can do competently and where you could use more help, some of which I may be able to give you and some of which you might need to find somewhere else. I would help you work out how to do that.

Comment
Huria had successfully used her perceptions to move the coaching into the real situation. If Al had reacted even more defensively and her unease about the information she was getting increased, Huria would have had to decide whether to confront him further or discontinue the sessions. In this circumstance it is likely that Al would have decided to change coaches.

If coaches become concerned that a person they are coaching is behaving unethically or exploitatively of colleagues or a client group or their employer, the coach should state his or her observations and if necessary discontinue working with them. In an extreme situation the coach might contact an employer, after advising the client they were going to do this.

What workplace coaching is not

There is no place for therapy in workplace coaching. Unlike therapy, coaching does not focus on feeling states, or unpicking the early origins of these, or exploring the unconscious, but rather on thinking and planning. Feeling and thinking are not entirely separable and people will of course have feelings, often strong ones, in coaching sessions.

The boundaries between workplace coaching and therapy are quite clear. The coach's role is to validate and respect the feelings and encourage thinking about what actions need to be taken. If it appears to the coach that there are deeper and/or conflicted emotional issues affecting a client's ability to think and act in work situations, then the possibility of therapy — with a therapist — can be suggested.

WHO ARE THE CLIENTS?

Paid workers in voluntary organisations

Voluntary organisations by their very nature are often not experienced or well-informed employers. There may be no-one in the organisation who is able to give regular, informed supervision to a coordinator, manager or director. The person in this role is the paid professional and may know more about employment practices than anyone on the committee or board. Workers in voluntary organisations also may lack colleagues with practical experience and knowledge in fields like community development, working with volunteers, and organisational structures. These organisations usually recognise the need for outside coaching and will pay for it, but not at the highest level of fees.

Paid workers in social service areas and business

Paid workers may be managers or front-line workers. They may seek coaching to assist them to maintain a balance in their lives, to explore challenging issues, to increase their understanding of organisational dynamics, to continue to develop their abilities and thinking, to have a confidential space to 'let off steam', to counter isolation, or to maintain a planned career path. Most often, but not always, people in this group pay for the coaching themselves.

People who are self-employed and/or run a small business.

Clients from this group are often isolated in their work and seek confirmation that they are 'on the right track'. They want to maintain balance in their lives, want a sounding board for their ideas, assistance with time management, prioritising, or any other area of their work.

COMMON CONCERNS

There are a some recurring concerns that come through in working with people from all three groups:

- time management
- dealing with stress
- managing workloads
- dealing with difficult people
- understanding organisational structures
- maintaining personal integrity
- maintaining balance, both in the workplace and in their life.

These are the main areas in which a coach needs experience, expertise and a wide range of ideas, strategies, and ways of thinking. Coaching is an ongoing exploration of ways that will enable the client to develop in their work situation.

HOW WORKPLACE COACHING SESSIONS CAN RUN

The client controls the content, by bringing along their concerns, or by working to a pre-determined plan, or a combination of these. Some people like to set up a formal agreement with a written list of goals to be reviewed at a specified time. Here are a couple of sample plans:

Workplace coaching Plan I

Between the coordinator of a community house in a large city and a supervisor/coach.

Goals (To be reviewed after six months.)

- To learn more about issues affecting community groups, such as:
  - power and powerlessness;
  - dealing with conflict..
- To develop productive strategies for being an employee in a voluntary organisation, with particular emphasis on :
  - presently monthly reports that get a response from the committee;

    - communicating with steering committee members.
- To develop a vision for the centre that works for myself as coordinator, for the steering committee, and for the users of the centre.

The following plan was devised with the manager of a specialist group within a large organisation that has headquarters overseas. The client manages a staff of eight, who in turn work with a total of forty technicians.

Workplace coaching Plan 2

Goals

- Dealing with presenting issues.
- Sounding board and progress check for:
    - reporting on budget issues;
    - refining employment process for technicians;
    - other means of improving retention of technicians within a limited budget.
- Development of skills in supervising staff, including:
    - planning a supervision session;
    - the scope and coverage of a session - including tasks and professional development;
    - making sure supervision time is worthwhile and of value to the staff member;
    - dealing with non-performance.

- Developing abilities in producing written reports

The final plan was developed with a senior manager in a large institution who had excellent financial and planning skills but felt inadequate dealing with staff issues.

Workplace Coaching Plan 3

Goals

- Developing skills in giving direct feedback both positive and negative and setting up processes for change where necessary. This is the first and most important priority.
- To run better meetings, including:
    - dealing with people who dominate;
    - staying with an agenda;
    - people being more positive about attending.
- Planning and running supervision sessions with a particularly challenging staff member who it is difficult to keep on the topic in sessions and avoids looking at areas of work that need to be improved.

Coaching sessions

Sessions may begin with a very general question, inviting the client to say something about current workplace accomplishments and/or concerns. After talking for a few minutes a verbal contract for the session may be developed, for example, 'It looks as though today we could spend the time looking at some ideas for that difficult interview and doing a check on how your new diary system is working.' It is not always necessary to say this out loud, especially between people who have worked together for some time.

Identifying the concerns that are most pressing to the client is the key to a session the client will leave with a sense of accomplishment, with 'good work' having been done. These concerns are not always what is presented; some reading 'between the lines' and of body language, tone of voice and energy levels is needed.

Comments like, 'It seems to me that a big concern for you right now is getting your paperwork into some kind of system. Am I right about that?' may help to define a concern that was subterranean in the client's consciousness but actually underlying the issues they were bringing up. If the response to that comment is, 'Well, no, I'm pretty much on top of the paperwork right now,' then a coach should simply move on.

It is not the coach's role to be 'right' in every judgement, but to help the person they are working with to clarify and move forward on the concerns that matter to them. If the coach says, 'Do you think that a more organised system for paperwork would help you with meeting deadlines (when meeting deadlines is a real issue for the supervisee),' and the response is, 'No, the problem is to find the time to do the preparation,' then the coach should drop the focus on handling paper. No matter what brilliant suggestions they might make the person they are working with is not interested in that approach and is not likely to follow-up on any suggestions that are made.

The coach could shift the focus onto 'finding time' and if multiple handling of incoming mail is part of the time problem it could be discussed in terms of making it faster to create more preparation time. In this way the coach is working with the client's perception of what their concerns are and helping to find ways forward that have meaning and purpose to the client.

Most sessions include the coach doing some or all of the following:

- Listening with attention to what the person is saying;
- Validating their experience, eg, 'I'm not surprised you were angry, that was a rude response,' without letting the discussion get bogged down in helpless feelings;
- Reflecting back eg, 'Are you saying, then, that you find it difficult to say no in that situation, even though you want to';
- Seeking suggestions, eg 'What ideas do you have about that?';
- Making suggestion, eg ' For some people it works to make a list at the beginning of the day and tick things off. Does this appeal to you?' It is best to make several suggestions and encourage the client to take from them what is useful for them;
- Referring back to previous successes and building on them, eg, 'Remember how you prepared your arguments in advance for that management committee meeting about your hours, and kept bringing the discussion back to the point earlier this year? Would a strategy like that be useful in this instance?';

- Encouraging self-recognition and acknowledgement, eg, 'That is an extremely difficult situation and you handled it about as well as it could be handled. Are you giving yourself credit for that?';
- Initiating a learning opportunity from mistakes and disasters, eg, 'Clearly you would like to have acted differently. What ideas do you have now about what you would rather have done? Do you think you would be able to do that another time? What would you need to be able to?';
- \Encouraging realistic evaluation, rather than catastrophising or self-punishing. eg, ' How much of what happened was outside your influence? What can you do in the situation now? What can you do in the future to prevent this recurring?'

The aim is always for the client, by the end of the session, to have at least one new idea, option or action they can make use of immediately.

PEER SUPPORT AND COACHING GROUPS

In many workplaces peer supervision and support groups are a useful adjunct to summative supervision, outside coaching and line management. Many people have the communication and and analytical abilities to be useful resource people for each other. In this section I explore one way such groups of colleagues could work.

Membership

Peer groups often form from people who already know each other. They also arise from workshops or training sessions where people from across an organisation who do not often meet get together. Members are usually from a horizontal band across the structure of an organisation; they may have quite different content areas but similar levels of responsibility. It is not appropriate for a person to be in the same group as someone who has supervisory or management responsibility for their work. Membership is always voluntary. It is not desirable for people who work together on a daily basis to be members of the same peer support group.

Example: Group A

Fia, David, Colleen and Louie are all administrators in a large hospital. They are all responsible for supervising other staff and all have some budget and planning responsibilities, otherwise their work is very different. They first met at a training workshop on forward planning run for staff at all the hospitals in the region. They meet monthly over breakfast, and all get to their work half an hour later on that day, with the agreement of their managers.

Peer groups can also form among people who work in different organisations. Training sessions often provide a way for people to meet other people like-minded enough to form a peer group.

Example: Group B

Sarah, Ruth and Eileen are all managers of small voluntary organisations, answering to volunteer Boards. They know each other socially and discovered their similar work conditions by accident, at a party. They meet every three or four weeks over a long lunch, which each justifies by the fact that they don't always take a lunch break at all.

No-one checks on their hours of work. Ruth is the only one of the group who has outside supervision/coaching paid for by her employer. Sarah is trying to get this, Eileen feels it would be impossible in her organisation, money is too tight.

Three can be enough members for a peer support group, provided everyone reliably turns up, four is good, five is okay, six is too many.

Purpose
The purpose of a peer group is to provide support and share ideas and strategies relating to workplace issues. The focus for Group A for their first few meetings is on helping each other through the first budgetting and planning round under a new system. By the time the plans are completed they agree they have spent hours less on it because of sharing ideas and ways to complete the (major) task. Group B spent their first four sessions devising a strategy — slightly different for each of them — for bringing to their Boards' attention ways in which they (the Boards) could more effectively support the day-to-day workers, paid and volunteer, in each of their organisation.

Structure
Groups usually meet regularly, often monthly.. As the groups are small, formal facilitation is not usually necessary. Taking turns among group members in the role will keep skill levels reasonably even. Where a group does decide to have facilitated, it is important that everyone is clear what the roles and responsibilities of the facilitator are.

Group A decide to have facilitated sessions, each taking the role in turn, to learn from each other about facilitation as they go along. Group B members don't see a need for facilitation as they are so few.

Decide at an early meeting whether and how members will be available to each other individually or on the phone between meetings.

Make peer group meetings a priority, even when you have no particular issues of your own. Regard them as a valuable part of your professional development.

Ethics
Confidentiality must operate on more than one level:

1. In regard to situations and identities discussed.

   Names may not be used but often group members will guess who the individuals concerned are. All information discussed in the group must remain in the group. There is no place for speculation on identities — the purpose of the group is to focus on issues.

2. In relation to what group members disclose about themselves.

   Information gained about fellow members in the peer group should never be used or referred to in any other setting.

For example David, from group A, said in a meeting when Colleen's name came up as a possible chairperson for an internal training session, ' I don't think Colleen would like to do that, she finds it hard to get up in front of a large group.' Later he realised that he only knew that about Colleen from the peer group and felt that he had let her and the group down. He phoned Colleen, told her, and apologised, and at the next session they discussed the need for particular care in those situations.

Nothing that happens or is said in the group is to be used to another's disadvantage or advantage outside the group.

Action taken by any group member following discussion in the group is the responsibility of the member taking the action. For example, Eileen from Group B was very enthusiastic about having prepared a check list for her Board and how well they had received it and how it was making a big difference in how the Board related to staff. Ruth did something similar and was criticised by her Board for 'trespassing' on their territory. At the next peer group session she complained to Eileen about the trouble she (Eileen) had caused her. Eileen was able to point out that it was Ruth's decision to take that step, and what worked in one place might not in another.

The meetings

At the beginning of each meeting decide on an ending time, and how the time will be allocated. Each member can have equal time to raise their issues, or there can be a previously-decided theme, or the whole time can be used to discuss the concerns of one or two members. Members can derive considerable benefit from the ideas and insights generated in relation to someone else's concern and may not always want to claim time for themselves. Remember also to take successes as well as concerns to the group.

During the meeting, focus on identifying the issues and finding strategies and processes that the person could use to act in the situation. Don't try and find solutions for someone else. (This is often what we are very tempted to do.)

Here are some examples of useful questions and statements:

- What else do you need to find out?
- What do you think is your next step?
- How big is this isssue?
- Had you thought of trying……?
- When I was in a similar situation I found it useful to ……
- That is hard, no wonder you are stressed.
- What I get from what you are saying is ………

In these examples no-one is telling the person with the concern how to deal with or 'solve' their concern, but giving options, suggesting a variety of possible approaches and ways of seeing the situation, and sharing their own experience. Say, 'I would try ……,' rather than, 'You should try……'. The examples of what a a supervisor/coach might say, listed earlier in this chapter, could also be useful.

Ending the meeting

- Stick to the time set.
- Set the time and place for the next meeting, or decide who in the group will do this and let the others know.
- Arrange or confirm who will facilitate next time.

New members
Existing group members must be allowed to veto any potential new members. Never suggest to anyone that they might join the group without checking with every other group member first.

CONCLUSION

When choosing a coach/supervisor, look for someone who has knowledge and/or experience in the kind of situation you work in. For example, if you manage the staff of the patient records section in a hospital, it does not matter if your coach knows nothing about records filing and retrieval, but she or he should understand the challenges of operating in a large institution and managing a staff from diverse backgrounds. Or if you manage a voluntary organisation seek out a coach who has experience of working with unpaid management boards, and so on. A coach should be able to attend to the particular in relation to the wider picture of an organisation.