A to Z Information from
NJ Early Learning
Training Academy’s
Coaching Module

Gail Meister, Ph.D.
Center for Effective School Practices
Rutgers, the State University of New Jersey
A to Z Information from NJ-ELTA’s Coaching Module

Custom designed for coaches who support implementation of Quality Improvement Rating Systems (QRIS) in New Jersey and across the nation, this tool presents strengths-based coaching fundamentals in 26 easy-to-use sections—from A to Z. Veteran coaches, new coaches, and coaches-in-waiting alike will find practical knowledge and skills that can improve the effectiveness of their day-to-day work with site and center directors and other staff.

The tool focuses on competencies for using a reflective coaching cycle in the QRIS context. Topics include building relationships, listening and asking questions, setting goals, and action planning, all drawn from the complementary models of cognitive coaching, motivational interviewing, and practice-based coaching. Other featured topics include evaluation of coaching, ethics, and adult learning principles.

A to Z Information from NJ-ELTA’s Coaching Module provides 10 hours of material in 26 stand-alone sections. Each section consists of opening text, followed by questions for reflection and supplementary online resources. Most sections also include additional offline activities that can be used by an individual or a group of coaches.
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A. Introduction to A to Z Information from NJ-ELTA’s Coaching Module

Welcome to A to Z Information from NJ-ELTA’s Coaching Module. A to Z Information is a tool for coaches—and for technical assisters and consultants who serve in coaching roles—as they support directors and staff in the early care and learning settings that participate in their states’ Quality Rating Improvement System (QRIS) initiatives.

What you will find in A to Z Information. A to Z Information presents practical knowledge and basic skills for strengths-based coaching that adheres to a reflective coaching cycle. The topics were originally presented in a two-day, in-person workshop for new and veteran coaches in Grow NJ Kids, New Jersey’s QRIS initiative. A to Z Information adapts and expands that material for online users.

We designed this tool to have direct utility for the on-the-ground reality of coaching in a QRIS context. The goals of A to Z Information are to acquaint—or re-acquaint—coaches with basic principles and strategies of strengths-based coaching and to enhance coaches’ knowledge and skills in these coaching fundamentals.

Some of the concepts and strategies will already be familiar to those working in early childhood care and education, while others less so. The best practices in A to Z Information come from the field of education, as well as several other relevant fields, including psychology, medicine, and social services.

Three complementary coaching models. A to Z Information highlights three main models, each of which has a place in QRIS coaching: cognitive coaching, practice-based coaching, and motivational interviewing. One of our key objectives is for QRIS coaches to be able to recognize when each model or parts of each model are appropriate for a particular situation and which strategies to use. While gaining mastery will clearly take more extensive learning and practice with feedback than what A to Z Information offers, this tool points to resources that can lead QRIS coaches to mastery.

Cognitive coaching. The cognitive coaching model provides essential principles and component skills for QRIS coaching. Although there may be few opportunities for QRIS coaches to engage with directors in ‘pure’ cognitive coaching sessions, A to Z Information draws from this model valuable insights about how people learn and change, as well as powerful strategies for developing rapport, listening and asking questions, and helping clients discover solutions to problems.

Practice-based coaching. The practice-based coaching model offers processes for a plan-observe-debrief sequence between peers or collaborating partners. QRIS coaches are likely to use practice-based coaching with teachers who are implementing particular aspects of approved early childhood curricula. Most of the nationally available curricula that provide specialized training for coaches and supervisors who help teachers implement each specific curriculum incorporate the plan-observe-debrief elements of practice-based coaching. That’s why A to Z Information provides just a brief introduction to practice-based coaching. We recommend that
coaches seeking more information look into specialized training from curriculum developers or other authorized trainers.

Motivational interviewing. First developed as an alternative therapeutic approach, motivational interviewing provides principles for defining the ‘spirit’ of coaching interactions that can help clients overcome ambivalence about personal change. A to Z Information focuses on brief action planning, a method within motivational interviewing for spotting when clients are ready to change, and then guiding clients toward setting specific goals and making concrete action plans.

Other Big Ideas. A to Z Information also includes some general ideas that are important adjuncts to strengths-based coaching that adheres to the reflective coaching cycle. Some of those big ideas have to do with adult learning principles, coach competencies, coaching ethics, knowing yourself, the overall goal of coaching, and the evaluation of coaching (assessing both the progress of coaching and the coach's ongoing professional development). Other big ideas have to do with what coaching is not, such as how QRIS coaching differs from mentoring, supervision, and therapy, and which tasks don’t belong in a coach’s job description.

How A to Z Information is organized. A to Z Information contains 26 sections in all (including this one), as many sections as there are letters in the alphabet. Users may approach the sections in A to Z order or in an order of their own choosing. Each section is divided into three parts: opening text, Your Turn, and Resources:

The opening text introduces and summarizes the topic.

Your Turn poses questions for reflection, guides users to the resources, and sometimes describes optional offline activities they might wish to try.

Resources includes topical readings, videos, and links, as well worksheets and other materials for the optional offline activities.

Your Turn

• How familiar are you with the concepts and skills of coaching?

• What do you hope to learn from A to Z Information?

• Can you find one or more colleagues who will partner with you in working through A to Z Information or who will join with you in selected offline activities?

Resources


B. A Coach’s Kit

Most people already have some ideas about what coaching is. We designed 'A Coach’s Kit' to bring to mind a few of your established ideas about coaching. In addition to activating prior knowledge, we also intend for 'A Coach’s Kit' to stimulate new thinking about what coaching might—and might not—be.

Your Turn

NJ-ELTA invites you to view images of different types of specialized, portable containers on the 'A Coach’s Kit' worksheet (Resource B.1) and to imagine how each one is like a coach’s kit.

- How is each of the containers pictured like a coach’s kit?
- Which items would a coach carry in each kit and why?
- What other types of containers can you think of that might be like a coach’s kit?

You may wish to record your thoughts on the 'A Coach’s Kit' worksheet. That will make it easier to compare your responses with others and to revisit your initial thinking when you finish A to Z Information.

Resources

1. 'A Coach’s Kit' worksheet (Resource B.1)
C. Opportunities for Coaching

Grow NJ Kids and Quality Improvement Rating Systems (QRISs) in some other states assign coaches to support early care and learning sites and centers as they go through the QRIS process. There are many different kinds of early care and learning settings, for example, settings responsible for just infants and/or toddlers, just preschoolers, or all three; settings that are within a school district or are collaborating contracted providers, part of a for-profit or nonprofit network, or stand alone; settings affiliated with Early Head Start, Head Start, or neither; and settings in the public sector or those in the private sector. In NJ, all types are encouraged to participate in QRIS.

Veteran QRIS coaches tend to say that every site or center is unique. Each has its own history, facility, clientele, staff, neighborhood, and partners. These differences translate into a unique set of needs relative to QRIS, even though the steps and standards embedded in each state’s QRIS are similar for all early care and learning sites in that state.

Effective coaches target their coaching and other support to the specific needs of sites and centers. In some states, coaches collaborate with site and center staff to identify needs at individual sites and centers. But before and sometimes after this kind of needs assessment, directors and coaches may differ in their views of the process and/or an individual site’s or center’s needs.

Your Turn

• Are there certain needs that directors generally bring up regarding QRIS?

• What do coaches generally see as site or center needs?

• How would you balance needs related to quality in the long term and needs for short-term fixes?

• In your opinion, which specific needs take priority?

You may wish to gather your own data by interviewing one or more directors. If you are working with a partner coach, you can compare notes on what you have heard directors say their needs are. You also can interview your partner and/or other coaches for their perceptions of directors’ QRIS needs.

You may find it helpful to use the “Opportunities for Coaching” worksheet (Resource C.1) to create a side-by-side comparison of the needs articulated by directors and coaches. The worksheet also provides space for adding major needs you think they didn’t mention and for analyzing and ranking the priority needs.
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For further insight on needs, you can read two short sections on coaching before sites and centers get rated, based on findings from a national study, as reported in a paper from the National Center for Children in Poverty.¹

Resources

1. “Opportunities for Coaching” worksheet (Resource C.1)


D. What Coaching Is

There are many kinds of coaching today. Just a glance at professional and popular magazines brings up instances of executive coaching, life coaching, leadership coaching, instructional coaching, and more. Although the context varies across the different kinds of coaching, most kinds of coaching share a few common principles.

These common principles have to do with expectations for coaching, the role of the client, and the role of the coach.

We’ve found a wordless video that we think expresses the common principles well. It’s “How Coaching Works: A Short Movie,” just under four minutes long. (Although it has no words, it does have a sound track.)

Your Turn

NJ-ELTA suggests that you watch the video twice.

- As you watch it the first time, notice what the client does. What specific actions does the client take?
- As you watch it a second time, notice what the coach does. What specific actions does the coach take?
- How would you generalize from specific actions the coach took to name the roles a coach plays?
- What does this exercise reveal to you about the overall nature of coaching?

You may wish to use the “What Coaching Is” worksheet (Resource D.1) for making notes in the columns provided each time you watch the video. Another column is provided for naming the more general coach roles.

It also may be helpful to take a few minutes to reflect on how well the common coaching principles you’ve identified here match up with the principles implicit in your thinking about “A Coach’s Kit” (Resource B.1).

Resources

2. “What Coaching Is” worksheet (Resource D.1)

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E. Coach Competencies

Every manual on coaching seems to generate its own list of the roles or competencies of a coach. The lists identify different roles, use different terminology, and combine or separate certain roles according to the particular coaching context or the authors’ preference. In addition, some authors include as roles what others might call attitudes, and the other way around.

Despite these variations, there is a great deal of agreement on the types of things that coaches do. We present a “Competencies of Effective Coaches” list (Resource E.1) that we think fits with the job description of a QRIS coach, because it blends elements of leadership coaching, instructional coaching, technical assistance, and consultation. In fact, our list comes from a publication that advises Head Start directors on how to choose a “highly qualified consultant.”

Your Turn

NJ-ELTA invites you to read the list of the dozen coaching competencies and the short definitions (Resource E.1) that we have adapted from the Head Start guidebook.

• To what extent do you think each one of these coach competencies applies to QRIS work? Can you come up with concrete examples?

• How would you change the list to reflect what you believe are the relevant competencies for QRIS coaching?

• What would you re-word, add, or delete?

You may wish to use the “Coach Competencies” worksheet (Resource E.2) for your editing. You also can use it to assess yourself on your current level of competency for each item on your customized list. You’ll see that the worksheet suggests a rating system (“+” for strength, “*” for working on it, and “?” for not sure). Create your own rating system if that works better for you.

Resources

1. “Competencies of Effective Coaches” (Resource E.1)

2. “Coach Competencies” worksheet (Resource E.2)

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4 Ibid.
F. Beginning to Build Relationships

Building trust is a common principle that underlies various coaching models. It is often considered the very first stage in the reflective coaching cycle. But experts wisely remind us that a client’s trust in a coach is not based on a single act at one point in time. “Trust is about the whole of a relationship. . . . Trust is belief in and reliance on another person developed over time,” as Costa and Garmston state in *Cognitive Coaching: A Foundation for Renaissance Schools*. In contrast to rapport—a feeling these authors define as “comfort with and confidence in someone during a specific interaction” or a series of interactions—trust is broader, deeper, and more powerful.⁵

In *The Art of Coaching*, Aguilar introduces 10 steps for building trust by acknowledging that trust needs to be built early, during the “‘enrollment process, . . . [when] the client buys into coaching.” Yet she immediately goes on to say, “But trust is not simply built and left standing; it needs to be maintained and occasionally patched up. These steps are relevant across the duration of a coaching relationship.”⁶

Your Turn

NJ-ELTA invites you to read Aguilar’s “Ten Steps to Building Trust” (Resource F.1).

- Can you think of examples from QRIS work that illustrate each step?
- What are your takeaway messages from this reading on building trust in a coaching relationship?

You may find it useful to mark up the text by underlining or highlighting key words, phrases, or sentences as you read. How would you express in your own words the main idea of each step?

You may also wish to read the anecdote on building trust (Resource F.2) that Costa and Garmston tell.⁷

Resources

1. “Ten Steps to Building Trust” (Resource F.1)
2. “Developing Trust” anecdote (Resource F.2)

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G. Knowing Yourself and Your Clients

Coaching occurs in relationship. In strengths-based coaching, the client and the client’s needs relative to agreed-upon goals drive the relationship. Ultimately, the purpose of coaching is to equip, empower, and enable the client to take action. It is the coach’s responsibility to identify effective ways of working with the client so that can happen.

Finding those effective ways depends in part on coaches knowing both their clients and themselves. Coaches need to understand each individual client’s personality and preferences. How does a particular client see and interact with the world? How does the client think? What are the client’s preferred modes for learning?

At the same time, coaches need to understand themselves and how their personality and preferences impact a particular coaching relationship. Aristotle said that knowing yourself is the beginning of all wisdom. It is certainly one component of the wisdom that effective coaches bring to a coaching relationship.

Today we have ready access to any number of vehicles for getting to know ourselves and others. Pick up almost any popular magazine and you will find a quiz for rating yourself and your compatibility with your spouse, co-workers, or friends. Pop culture aside, there are also multiple research-based frameworks and associated methods for determining temperaments, personality types, and learning styles that can provide useful information for coaches in a coaching relationship.

We’ve selected three well-known frameworks that can help coaches gain insights for communicating effectively with their clients.

**Nine Temperaments.** The nine temperaments identified by founders of the Program for Infant and Toddler Care (PITC) may be familiar to QRIS coaches who work in settings with very young children. PITC’s founders also applied the idea of ‘goodness of fit’ to highlight compatibilities and incompatibilities between a child and the child’s caretaker. ‘Goodness of fit’ can also apply to coaches and clients. A coach (or caretaker) does not need to have the same temperament as the client (or child). Rather, the coach needs to accommodate the client’s temperament.9

**Myers-Briggs Type Inventory.** The Myers-Briggs personality inventory provides a means for typing individuals along four continua: extraversion-introversion, intuition-sensing, feeling-thinking, and perceiving-judging.9 The inventory contains 16 types in all, each a composite of an individual’s dominant traits or tendencies on each of the continua. Highlighting similarities and differences among individuals’ types is often used to improve team performance in the workplace.

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8 Center for Early Childhood Mental Health Consultation, “Introduction to Temperament” and “Temperament Traits.” *Infant and Toddler Temperament Tool (IT3)* (Washington, DC: Georgetown University Center for Child and Human Development), [www.ecmhc.org/temperament/traits.html](http://www.ecmhc.org/temperament/traits.html).

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**Multiple Intelligences.** Harvard University educator Howard Gardner’s formulation of multiple intelligences and associated learning styles has displaced the idea that there is just one way to be smart and one way to learn.\(^1\) His framework, which describes eight distinct intelligences, is widely used as a guide for adjusting instruction in preK-12 education. Individual coaches and clients will likely exhibit strengths or preferences in one or more intelligence areas that may suggest how they receive information and communicate best.

**Your Turn**

- What are the relative strengths of each framework? Which framework especially resonates with you as a way to understand yourself and your clients?
- What are your dominant traits or type according to that framework? How does your profile match up with the profiles of your individual clients?
- What are some implications for working with a client whose temperament, personality type, or learning style differs from yours? What strategies can you use to increase the 'goodness of fit' between you and your clients?

You may wish to use the “Multiple Intelligences and Learning Styles” worksheet (Resource G.1) for a quick inventory of your dominant intelligence(s) and learning style(s). The worksheet defines each type of intelligence and provides space for rating yourself in terms of what is dominant for you ('Me' column) and what is definitely not dominant for you ('Not Me' column). There’s also space for jotting down strategies on working with people who are not like you.

You may also find it helpful to exchange ideas with another QRIS coach or two whose dominant traits or types are not like yours on how to work effectively with people like them.

**Resources**

1. “Introduction to Temperament” and “Temperament Traits,”
   www.ecmhc.org/temperament/02-introduction.html and
   www.ecmhc.org/temperament/traits.html
3. “Understanding Your Student’s Learning Style” blog post,
4. “Multiple Intelligences and Learning Styles” worksheet (Resource G.1)

**H. Getting in Sync**

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Building trust in a coaching relationship calls for a combination of authenticity and a careful, or even calculated, application of expertise on the part of the coach. The coach’s authenticity flows from a genuine concern for the client and an interest in providing a useful service. The application of expertise—the professional discipline of coaching—relies on the coach’s skilled selection and implementation of particular strategies and techniques.

“You cannot manipulate someone into a relationship of trust and rapport,” Costa and Garmston warn in Cognitive Coaching: A Foundation for Renaissance Schools. But you can use techniques that help increase rapport, which in turn can help build trust. Getting in sync with a client’s behaviors is one such technique.

Getting in sync—also known as synchronizing, entraining, oscillating, harmonizing, matching, or mirroring—is an evidence-based technique for achieving greater congruence between two people. When a coach subtly mirrors a client’s posture, gestures (such as the coach crossing legs when the client does), breathing, rate of speech, inflection, volume, and/or language choices, the client is more likely to experience a higher level of rapport.

A to Z Information will focus on language choices elsewhere. Here we focus exclusively on the other client behaviors.

Your Turn

- Which client behaviors are easiest for you to mirror? Which are the hardest?
- What are the potential downsides to mirroring? How can you mitigate them?
- How do you manage to simultaneously mirror a client and engage with the content of a coaching conversation?

You may wish to review a description of paralanguage and short definitions of the behaviors that coaches can mirror (Resource H.1), as excerpted and adapted from Cognitive Coaching. As you practice the mirroring technique, you can use the “Getting in Sync” worksheet (Resource H.2). If you are working alone, you might use the worksheet as an informal checklist as you observe people around you—a couple deeply engrossed in a conversation at a neighboring table in a restaurant, say, or a group at a team meeting.

You can also use the “Getting in Sync” worksheet if you undertake a structured, interactive practice session with two partners. The worksheet suggests first deciding on a topic that each partner can readily discuss with some animation in the space of 90 seconds, such as the condensed version of how a partner came to be a QRIS coach. The partners then determine which of them will play the roles of ‘client,’ ‘coach,’ and ‘observer’ for the first round. The first ‘client’ tells her story for 90 seconds. During that time, the ‘coach’ practices as many of the mirroring techniques as possible. The ‘observer’ keeps time and tallies the different ways and number of times the ‘coach’ mirrors the ‘client.’ The partners then debrief. (The worksheet also

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12 Ibid., 74-78.
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has suggestions for conducting a short debriefing.) The partners can rotate roles, so that each person has a chance to practice mirroring and get feedback.

Resources

1. “Paralanguage” (Resource H.1)

2. “Getting in Sync” worksheet (Resource H.2)
I. More Diversity in Building Relationships

Finding a good fit between coach and client may require overcoming or accommodating a number of differences.

At least two of the 12 coach competencies address this need: adjusting for differences and showing cultural sensitivity (see section E). Temperament, personality type, and learning style are just a few of the other domains in which coach and client might differ, and which may require their explicit attention before they can communicate and collaborate effectively (see section G). Age, gender, ethnicity, and cultural background may also need to be addressed (see “Be Open About How You Are and What You Do” in “Ten Steps to Building Trust,” Resource F.2).

There are still other domains where differences between a coach and a client may interfere with an effective coaching relationship if left unaddressed.

Your Turn

- Which other domains of difference can you think of that might impact the building of a coaching relationship?

- What examples of one or more of these differences in your coaching work come to mind? How did you handle them at the time? If you were to encounter a similar situation now, what might you do differently?

- What general strategies can you recommend for recognizing and respecting diversity in QRIS coaching relationships?

You might wish to review some additional possible differences between coaches and clients in “More Diversity” (Resource I.1).

Resources

1. “More Diversity” (Resource I.1)
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J. Criticism, Praise, and Affirmation

Strengths-based coaching builds on affirmation. It shares with other strengths-based or appreciative approaches a focus on success (what has worked in the past) and hope for the future (what might be if changes are made). An experienced early care and learning coach, Tychawn Johnson, reports that she strives to create “a partnership atmosphere” so that she can “work collaboratively” with teachers and assist them to become “more intentional” about their practices by pointing out to them, “These are the moments I notice that you were effective.” Affirmation is the key.

It may be obvious that criticism is not affirmation. It may also be obvious that statements containing words such as ‘wrong,’ ‘incorrect,’ or ‘poor’ constitute criticism and not affirmation. Other criticisms may be more subtle, such as ‘You’re almost right’ and ‘Where did you get that idea?’ We have all probably heard, or made, statements like these in our professional or personal lives.

It may come as a surprise that praise is not affirmation either. Statements like ‘excellent,’ ‘good,’ and ‘great’ count as praise. So, too, do ‘I like that’ and the ubiquitous ‘good job,’ an almost-reflexive response for some of us.

What’s the matter with praise? Counterintuitively, praise may have the effect of repressing the very behaviors the praise-giver intends to encourage. Costa and Garmston, the fathers of cognitive coaching, cite studies that found “the one person for whom praise has the most beneficial effects is the praise giver. When praise and rewards are given, experimentation is inhibited." In other words, praise is more likely to freeze a client at the place where the client currently is and stifle change than encourage it.

In contrast, affirmation consists of statements that describe specific, concrete behaviors and that are free from judgment and comments on personal characteristics. Affirmation works for coaches interacting with clients as it does for adults interacting with children, as recommended by HighScope and other developers and trainers. Examples of affirmation that coaches can offer clients are always context-specific but may sound like, ‘You really worked hard on . . .,’ or ‘I can see that you tried several different approaches until you found one that was effective for you,’ or ‘You clearly thought through what could happen before you chose a course of action.’

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Your Turn

- Which statements of criticism—obvious or subtle—have you heard or used in QRIS work? To what effect?
- What are some statements of praise that you have heard or might have used in a coaching relationship?
- How could you turn these statements of criticism and praise into affirmations?

You might wish to read the quotes on affirmation and a strengths-based approach to coaching (Resource J.1). You may also find it helpful to review the qualities of affirmation in the table in the CCNC Motivational Interviewing Resource Guide (second row, p. 11).16

Resources

1. “Quotes on Affirmation and Strengths-Based Coaching” (Resource J.1)

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K. The Why of Coaching

Coaches are often, but not always, highly experienced and skilled practitioners who have excelled in performing the very functions that a client currently performs. Some QRIS coaches, for example, may have served as early care and learning teachers, supervisors, trainers, and/or directors. Sometimes, however, QRIS coaches bring experience and expertise from different positions or entirely different fields.

As an expert, a coach may be supremely equipped to identify strengths and needs, diagnose problems, and offer solutions. Veteran coach Diana Courson recalls her reaction when she first heard about the opportunity to become a coach. “I would love to do that,” she thought. “I know so much and I would like to share with other people so they can benefit from my experience.”17 Like Courson, some coaches may feel the impulse to jump in and set things right or tell others how to do it, at the very least.

But Courson goes on to share what she subsequently learned about the rationale for coaching, which she has since adopted as her ‘coaching stance.’ “I discovered that [ imparting my knowledge is] not really what coaching is about. It’s not about fixing it. It’s not about my experience,” she says. “It’s about what can I do to listen and help that person articulate what she’s actually doing . . . [and] identify what’s happening,” and its impact on the children.18

Whatever a coach’s areas of expertise, one thing that always matters is the capability to coach. As two experts on coaching have written, “The coach need not be a more expert performer than the person being coached; . . . . Technical expertise frequently is less relevant than the ability to enable or empower people to move beyond their current performance.”19

Elena Aguilar, another veteran coach and author of a coaching manual, responds more globally to the question of why coaching. She has created her own vision of coaching that reads in part, “I coach to heal and transform the world. . . . I coach people to find their own power and to empower others.” However lofty and poetic her vision, she says it serves a very prosaic and down-to-earth purpose. “When I question why I’m doing what I’m doing, or when I feel unmoored by the challenges in my daily practice, I return to my vision. It helps me remember, it energizes me, and it grounds me.”20

Your Turn

• If coaching is not about telling others what to do or how to do it, then where do a coach’s knowledge and experience fit into coaching, if at all?

• Do you agree with Evered and Selman’s statement above that “technical expertise frequently is less relevant [for a coach] than the ability to enable or empower people to move beyond their current performance” for QRIS work?

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17 Jablon, Dombro, and Johnsen, Coaching with Powerful Interactions, video #6, p. 34.
18 Ibid. 
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- What is your vision for coaching?

You may wish to read the rest of Aguilar’s coaching vision (Resource K.1) and use her online questions to prompt you in writing your own vision. We hope that you will write your own and consider it a draft or a living document that you revisit repeatedly and refine over time.

Resources

1. “A Vision for Coaching” (Resource K.1)

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I. The Reflective Coaching Cycle

Knowledgeable coaches describe coaching much as organizational development professionals describe change: It is a process, not an event. Many coaches refer to the reflective coaching cycle to convey more fully the stages or evolving focus of the work as coaching progresses. The reflective coaching cycle is reflective, in that coaches invite and facilitate reflection by clients. And it is a cycle, in that there is an overall progression from stage to stage, and in that a coach and client may go through the series of stages more than once.

Although there are many different ways to depict it, the reflective coaching cycle commonly includes a few key stages.

Building a relationship. Graphic representations of the reflective coaching cycle typically start with the stage of building the coach-client relationship. In this stage, client and coach get to know each other and ideally develop trust. (See “Beginning to Build Relationships,” “Knowing Yourself and Your Clients,” “Getting in Sync,” and “More Diversity in Building Relationships,” sections F, G, H, and I.)

Setting goals. Since coaching is a means for pursuing particular improvements or outcomes, an early stage in the reflective coaching cycle is dedicated to setting goals. The coach assists the client in articulating the specific change or improvement that the client seeks. This stage also includes coming to an agreement about the coach’s role and how the coach and client will work together. (See “On the Way to Goal Setting and Action Planning” and “Brief Action Planning,” sections S and T.)

Gathering data. In the data-gathering stage, the coach helps the client clarify and understand more deeply the nature and dimensions of the issue or goal on which the client is working. The coach also helps the client identify and explore potential solutions. In strengths-based coaching, this exploration focuses on the client’s strengths or successes with similar situations in the past and the consideration of specific strategies that the client may want to try out in the current situation.

Planning. The planning stage entails preparation for trying out the strategies or changes on which the client has decided. Within the coaching relationship, the coach may help the client consider possible scenarios, rehearse statements or responses, or undertake other steps to get ready for action. Planning may also require the client to seek training, resources, or agreements outside of the coaching relationship.

Evaluating. Once the client has taken action, the coach works with the client to evaluate the effectiveness and consequences of the action. The coach helps the client appraise the degree to which the client’s goals are being met and devise appropriate next steps.

Going through the stages of the reflective coaching cycle may involve multiple recursions—going through one stage or the whole collection of stages more than one time—to help a client reach the goal. A coach and client may also start the reflective coaching cycle afresh when new goals are added.

Your Turn
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- To what extent have you had the opportunity to coach a client all the way through the reflective coaching cycle? What worked especially well?

- As you reflect on your coaching experience, are there particular stages in the reflective coaching cycle that are consistent areas of strength for you? Can you point to coaching strategies or behaviors that you used to achieve success in those stages?

- As you continue to reflect on your coaching experience, are there particular stages in the reflective coaching cycle where you have typically struggled? Is there anything in the stages where you’ve had success that suggest strategies that you could apply to your areas of struggle?

- If you have had the opportunity to work through the reflective coaching cycle more than once with a client, what stood out for you about coaching through the second or the third or any subsequent cycles?

We have provided a composite graphic of the reflective coaching cycle as presented in this section (Resource L.1). You may wish to search online for other representations of the reflective coaching cycle. As you examine a few of those graphics, what insights about coaching do the different representations bring up for you?

You may also find it helpful to draw your own version of the reflective coaching cycle. How many stages are there in your reflective coaching cycle, and how would you label each stage?

Resources

1. “Reflective Coaching Cycle” graphic (Resource L.1)
M. Quotes on Coaching

In strength-based coaching that follows the reflective coaching cycle, clients are the ones who do the work of exploring issues and discovering solutions. It may seem odd to some people that the client has to do the heavy lifting in a coaching relationship. They may wonder what the coach is supposed to be doing if the client is doing a lot of the work.

The animated coach in “What Coaching Is” (section D) and the definitions of coach competencies (Resource E.1) suggest what a coach is supposed to do.

We now turn to two veteran coaches and a 17th century philosopher to tell us more about a coach’s work. The two coaches, each with a broad 21st century education coaching practice, describe aspects of what they understand the coach’s role to be. The 17th century French philosopher Blaise Pascal comments on a universal human trait that explains why their kind of coaching works.

“When you are listening very deeply to another person, your own thoughts and concerns quiet down and your ego naps in a corner of your mind. This creates a tremendous space for your client to explore her own issues. You can support and guide that exploration through the questions you ask. Once you’ve created a clear, safe, nonjudgmental field, there is plenty of space for clients to wander around their own mind, exploring their beliefs, their blocks, and their goals and how to fulfill them.”

Elena Aguilar

“Sometimes I think the role of a coach is that of a travel agent. Your job is to take that teacher wherever she wants to go [when] there are a lot of options for getting there. So the coach’s task becomes to help that teacher crystallize her preferences. Where’s she going to go, when does she want to leave home, when does she want to arrive in the place she’s going? Does she like an aisle seat, a window seat, a middle seat? . . . Sometimes I offer suggestions if she’s not sure. The final itinerary may not be the one I would have chosen. It might not be the way I want to travel or where I want to go. But the important thing is that the teacher gets there in her own way.”

Diana Courson

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A to Z Information from NJ-ELTA’s Coaching Module

Your Turn

• What appeals to you in each of the quotes above?
• What would you want to ask the author of any of the quotes above?
• If you could add a line to any of the quotes above, to which quote(s) would you add line(s), and what line(s) would you add?

You may find it helpful to review “More Quotes on Coaching” (Resource M.1) and ask yourself the same questions relative to those quotes.

You may also wish to search online for additional quotes that instruct or inspire you. You will probably come across a number of quotes on coaching in sports and business that seem incompatible with strengths-based coaching that follows the reflective coaching cycle. In passing, you may wish to reflect on how they contrast with strengths-based coaching.

Resources

1. “More Quotes on Coaching” (Resource M.1)
A to Z Information from NJ-ELTA’s Coaching Module

N. Coaching and Its Kin

Coaching is just one means of supporting clients to engage in reflection and undertake change. Others include consultation, counseling, mentoring, supervision, and training. Each has value and its own place among the helping professions. We at NJ-ELTA think of these other means of support as coaching’s kin. While each of them shares one or more features with coaching, each differs from coaching in important ways.

Coaches need to know the difference. Among other things, the roles of coach and client differ across the various means of support. Being clear about the type of support a coach can offer a client has consequences for what each person can expect in the relationship and for the outcome. For coaching to be effective, it is also important for coaches to recognize and stay within its boundaries.

That said, we have noticed that QRIS work often goes beyond coaching. It sometimes calls for QRIS coaches to provide training, consultation, and technical assistance. It could conceivably call for QRIS coaches to step into the role of mentor and possibly even counselor. Indeed, we can imagine that QRIS coaches engage only intermittently or rarely in ‘pure’ coaching in their day-to-day interactions with site and center directors and staff. The complex and shifting reality of the QRIS coach’s role makes it even more imperative for coaches to be aware of the similarities and differences between coaching and other types of support.

Your Turn

• What do coaching and the other means of support have in common? What distinguishes coaching from each of the other means of support?

• Which strategies or techniques from coaching’s kin do you typically use in your practice?

• What do you envision would happen if a coach were to allow other types of support to bleed into coaching without clearly demarcating the transition?

• What is your takeaway message from contemplating the differences between coaching and its kin?

You may wish to quiz yourself on the differences between coaching and its kin by unscrambling the terms and definitions on “Coaching and Its Kin: Scrambled Definitions” worksheet (Resource N.1). You can see the answers on “Coaching and Its Kin: Unscrambled Definitions” (Resource N.2).

You also might like to test yourself by identifying which of the support activities listed on the “Coaching and Its Kin: Activities” worksheet (Resource N.3) belong in supervision, mentoring, or coaching. Hint: some activities belong in more than one category. After testing yourself, you
may wish to look up the findings online and delve more deeply into a literature search comparing coaching and its kin.23

Resources

1. “Coaching and Its Kin: Scrambled Definitions” worksheet (Resource N.1)

2. “Coaching and Its Kin: Unscrambled Definitions” (Resource N.2)

3. “Coaching and Its Kin: Activities” worksheet (Resource N.3)


O. Getting Ready to Listen

Listening is more than merely hearing someone else speak. Listening is a skill. In fact, listening is one of the foundational skills for effective coaching.

Although some people may be ‘good listeners’ by nature, listening is a skill that can be developed as part of the discipline of coaching. Even highly competent coaches keep honing their listening skills throughout their careers.

Like stretching before running or vocalizing before singing, listening requires a warm-up ahead of time. The warm-up routine for listening that some coaches use involves clearing a space amid their own mental clutter and quieting or psychologically stepping away from the internal chatter of their own to-do lists and worries. Some coaches have described it as centering themselves or quieting the agenda in their heads.

Another aspect of getting ready to listen is to do the coach’s version of the chef’s *mise-en-place*—organizing and arranging the ingredients and utensils for the dishes that will be prepared during a shift.24 The *mise-en-place* for a coach might include reviewing the goals that the coach and client agreed on, checking notes from previous sessions, retrieving resource materials that may be pertinent, and making sure that actions the coach had pledged to take before the next session have been completed.

It may also happen that a coach will need to draw on 'getting-ready' techniques once a coaching session is under way. Maybe the client says something that triggers strong emotions or associations in the coach. Without wanting to, coaches in this situation may find themselves distracted by their own personal reflections and memories; they will then need to re-center themselves and once again set aside their own agenda in order to refocus on the client.

Your Turn

- What do you do to get ready to listen?
- Are there any triggers or distractions you know of that can consistently threaten to draw your attention away from listening? What do you think are the consequences for the coach and for the client when a coach is not fully ready to listen?
- What strategies have you used to pull yourself back to listening to a client if you find that your focus has strayed?

You may wish to read about how administrator Jill Naraine gets ready to listen, as she recounts in an excerpt from *Coaching with Powerful Interactions*25 (Resource O.1).

Resources

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25 Jablon, Dombro, and Johnsen, *Coaching with Powerful Interactions*, video #15, p. 78.
1. “Quieting the Static” (Resource O.1)
P. Listening and Asking Questions

Listening and asking questions are tightly coupled in strengths-based coaching that follows the reflective coaching cycle. Since the aim of this kind of coaching is to help clients explore their issues and discover their own solutions, questions are a coach’s go-to tool.

The definition of questions as used in coaching may feel a little slippery. Effective questions in coaching often look like questions—statements with a question mark at the end—but sometimes they don’t. And not all statements that end with a question mark are effective questions for coaching.

Effective questions for coaching are nonjudgmental statements—with or without question marks—that elicit thoughtful responses from clients. Coaches use these statements to help clients solidify or confirm their views, understand their own thinking, change their perspective, and visualize new possibilities. Such statements serve to reflect back to the client what the client has said, sometimes summarizing and possibly labeling the general concepts that match the client’s specific experience. Examples of sentence stems include, ‘Am I understanding you right that . . .’ or ‘I hear you saying . . .’ or ‘So the teachers talk to parents when they pick their kids up but don’t have materials at hand or a systematic process for sharing what the children are learning?’

Other effective question statements draw clients into clarifying their thinking and taking it further. Clarifying statements might include ‘Can you give me an example of . . .’ or ‘Please say more about . . .’ Examples of statements that invite clients to deepen or expand their thinking include ‘What criteria did you use to . . .’ or ‘Can you tell me about a previous time when you successfully . . .’, and ‘I noticed that . . .’ or ‘What’s another way you could . . .’ or ‘I wonder what would happen if . . .’

Still other effective question statements help clients crystallize a plan and commit to particular action steps. Questions of this kind might include ‘How might you start to . . .’ or ‘What’s clearer for you now?’ or ‘Can you repeat what you are planning to . . .’ and ‘How confident are you that you will be able to . . .’

Which question to ask in a coaching relationship depends a great deal on the context (the goals, the stage, the moment, the emotional resonance, and more). Various experts on coaching have published lists of question statements, sometimes clustering them in categories that you may find useful. But the real key to using them effectively remains the coach’s ability to listen.

Knowing which questions not to ask can be useful, too. In general, strengths-based coaching avoids passing judgment and providing directives in most cases (especially when the coach delivers them in ‘disguise,’ in the form of rhetorical or leading questions). Rambling questions are also bad questions. Even if they indicate that the coach is thinking aloud—note that thinking is good but should be done silently and ahead of time, if possible—rambling questions can confuse or lose a client along the way. In addition, closed-ended questions that elicit only ‘yes’ or ‘no,’ or a fact as an answer, are usually less effective in opening up a client’s thinking than open-ended questions. The main thing is for a coach to be aware of the kinds of questions that will be responsive to a client’s needs both overall (relative to the client’s goals) and at a given moment.
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Your Turn

- What are some of the question statements you currently use in your coaching practice? What are some new question statements you want to consider adding?

- What are some questions that you currently use but that you might want to avoid using in the future? Can you find more effective questions you could use instead?

- How do you know which questions to ask when?

- In what situations could you practice using the new question statements?

You may wish to review the list of question statements that veteran coach Elena Aguilar has compiled.26 Although Aguilar has divided them into categories, some statements appear in alternate forms within categories and/or are repeated across categories. You may find it helpful to look for question statements that you do not currently use and want to consider adding to your coaching practice.

You also can view the “Model Coaching Conversation” video in which Jessica coaches Kelli, a technology specialist, about rolling out a new program to a mixed group of teachers and assistant teachers who have different job responsibilities and varying levels of experience, anxiety, and interest in computers.27 This six-minute video illustrates the use of reflective language in question statements, as well as the progression of question statements that results in a client-generated solution to the presenting problem. You may also wish to write down Jessica’s question statements as you watch the video and examine them afterwards to study the progression.

If you would like to practice using question stems in a simulation exercise, you can use “Story Starters” and the “Reflective Language Practice Protocol” worksheet with one or two partners. “Story Starters” (Resource P.1) proposes eight everyday topics or dilemmas as the basis for a short coaching session (say, three minutes on the ‘client’s’ choice of topic). As ‘coach’ in the simulation, you would identify three or four question statements that you want to practice. If you are working with two partners, one can act as ‘observer’ to keep time and record the ‘coach’s’ question statements on the “Reflective Language Practice Protocol” worksheet (Resource P.2). (That worksheet also provides instructions that you may wish to follow in debriefing.) If your partners are QRIS coaches themselves, they may want to repeat the simulation using a topic of each ‘client’s’ choosing until each partner has had a chance to practice.

You may also wish to review Aguilar’s “Questioning Mistakes.”28 She offers a set of 10 questioning mistakes that she adapted from master coach Tony Stoltzfus, to which she has added her own explanations and confessions. Her comments on questioning mistakes include

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suggestions for more appropriate questions and self-modifying strategies to help a coach avoid questioning mistakes.

Resources

1. “General Coaching Sentence Stems,” www.elenaaguilar.com/#!coachingtools/c24vq


3. “Story Starters” (Resource P.1)

4. “Reflective Language Practice Protocol” worksheet (Resource P.2)

5. “Questioning Mistakes,” www.elenaaguilar.com/#!coachingtools/c24vq
Q. Three Models for QRIS Coaching

*A to Z Information* highlights three models for QRIS coaching: cognitive coaching, practice-based coaching, and motivational interviewing. All three models are well-established and nationally known.

Given the cocktail that is the QRIS coaches’ role—coaching laced with consultation and technical assistance, sometimes with other types of support mixed in—it makes sense to look beyond a single model. We believe that each of these models offers useful principles and strategies for QRIS coaches. Taken together, the three models complement each other in providing a strengths-based, reflective approach for supporting QRIS coaches’ clients.

This section briefly discusses the three models. (See also “Introduction to A to Z Information from NJ-ELTA’s Coaching Module,” section A.)

The ideals and techniques of cognitive coaching suffuse much of *A to Z Information*, though we explicitly discuss cognitive coaching’s concept of states of mind in “Individual Change Theories” (section R) and its techniques for building rapport in “Getting in Sync” (section H).

We present the theoretical framework that underpins motivational interviewing in “Individual Change Theories” (section R). We focus on its approach to goal setting and action planning in two other sections (“On the Way to Goal Setting and Action Planning” and “Brief Action Planning,” sections S and T).

We approach practice-based coaching somewhat differently. Although practice-based coaching occupies an important place in QRIS classroom coaching, its ‘plan, observe, debrief’ sequence is embedded in training for coaches and supervisors related to individual proprietary curricula. Accordingly, we present only a short overview on practice-based coaching in this section of *A to Z Information*.

*Cognitive Coaching* was developed by Arthur Costa and Robert Garmston in the 1980s. Borrowing ideas from such fields as clinical supervision, cognitive psychology, and counseling, cognitive coaching is “a nonjudgmental, developmental, reflective model.”29 “At one level,” its founders state, it is “a simple model for conversations about planning, reflecting, or problem solving”30 that was originally built around a ‘plan, observe, debrief’ sequence for supporting teacher growth but that has since been expanded for use in many other settings. The goal of cognitive coaching is to engage and enhance a client’s own thinking so that the client can become a self-directed individual and member of a community. Signature parts of cognitive coaching incorporated in *A to Z Information* include building trust and rapport, and structuring conversations with questions and silence to elicit client reflection. Cognitive Coaching Seminars (formerly the Center for Cognitive Coaching) in Highlands Ranch, CO, promulgates resources and training in cognitive coaching. For more information, visit the Thinking Collaborative web site, [http://www.thinkingcollaborative.com/product-category/cognitive-coaching](http://www.thinkingcollaborative.com/product-category/cognitive-coaching).

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**Practice-Based Coaching** is a “cyclical process for supporting teachers’ use of effective teaching practices,” which is meant to be implemented “in the context of a collaborative partnership.” A method for instructional coaching, it was articulated especially for Head Start supervisors, coaches, or peers working with teachers as they try out new practices. Its three main components are shared goals and action planning, focused observation, and reflection and feedback. Like cognitive coaching, it is “neither evaluative nor judgmental.” Practice-based coaching depends on a joint data-gathering experience in which the coach observes the client. More information about practice-based coaching is available from the National Center for Quality Teaching and Learning at the University of Washington in Seattle, WA, [http://eclkc.ohs.acf.hhs.gov/hslc/tta-system/teaching/development/coaching.html](http://eclkc.ohs.acf.hhs.gov/hslc/tta-system/teaching/development/coaching.html).

**Motivational Interviewing** was developed by psychologists William Miller and Stephen Rollnick in the early 1990s to overcome clients’ ambivalence toward changing personal behavior, specifically problem drinking. As an approach to counseling, it departs from the prevailing therapeutic mode of deep self-exploration by focusing on shaping goal-directed change, but only if and when a client is ready. Like cognitive coaching and practice-based coaching, motivational interviewing provides nonjudgmental support. As in practice-based coaching, coaches who use motivational interviewing take a collaborative or collegial stance. A to Z Information incorporates brief action planning, a practical and compact adjunct to motivational interviewing that psychiatrist Steven Cole originated in 2002. Once a client indicates readiness to change by using recognizable ‘change talk,’ the coach can initiate brief action planning, in which the client identifies and commits to explicit action steps and follow-up. The Motivational Interviewing Network of Trainers, based in Fairfax, VA, oversees training in motivational interviewing at [http://www.motivationalinterviewing.org](http://www.motivationalinterviewing.org). The Centre for Collaboration, Motivation, and Innovation, based in British Columbia, Canada, provides training and resources related to brief action planning at [www.centreCMI.ca](http://www.centreCMI.ca).

**Your Turn**

- What stands out for you in each of the coaching models?
- To what extent does your coaching practice include strategies or techniques from each model? Can you think of precise examples?
- Even if you don’t currently use strategies or techniques from one or more of the models, where might they be useful in your coaching practice?

If you wish to read more about the three coaching models, see “Overview of Cognitive Coaching” and/or “Cognitive Coaching,” Practice-Based Coaching: Collaborative Partnerships, and “Dancing, Not Wrestling.” Note that “Cognitive Coaching” and Practice-Based Coaching are used interchangeably in this text.

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32 Ibid, p. 3.
A to Z Information from NJ-ELTA’s Coaching Module

Based Coaching were written by developers of those models, while “Overview of Cognitive Coaching” and “Dancing, Not Wrestling” are summaries by practitioners. These summaries may reflect the practitioners’ own emphases and thus may diverge slightly from how other sources describe those two models.

You may wish to view the video that chronicles a physician’s adoption of motivational interviewing with a patient in “Mr. Smith’s Smoking Evolution.”\(^{37}\) You may find it helpful to make notes as you watch for the specific strategies that ‘took’ and decide for yourself exactly who or what evolved.

Resources


5. “Mr. Smith’s Smoking Evolution: Motivational Interviewing for Busy Clinicians,” [http://www.youtube.com/watch?v=0z65EppMfHk](http://www.youtube.com/watch?v=0z65EppMfHk) (10:00)

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R. Individual Change Theories

“There is nothing so practical as a good theory,” famously said psychologist Kurt Lewin. In this section, we briefly examine three theories for what goes on inside individuals’ minds as they approach and embrace change. The three theories come from cognitive coaching, motivational interviewing, and the concerns-based adoption model.

These theories have practical value for coaches, because they can lead to a deeper understanding of how clients experience change and thus enhance opportunities for guiding change effectively. Cognitive coaching theory identifies the mechanisms at work and shows where they fit in the process of individual change. The theories for motivational interviewing and the concerns-based adoption model identify various stages of change and how clients’ focus of attention alters as they move through the stages.

*Cognitive Coaching: Desired State Map.* Cognitive coaches facilitate their clients’ cognitive development in ways that move clients from an existing state to a higher, desired state. Cognitive coaching’s founders appropriated a relatively new word, holonomy, to express the ideal of this higher, desired state. Clients who reach this state function as autonomous individuals with “the ability to be self-managing, self-monitoring, and self-modifying.”

Not Nirvana, holonomy is rather a state in which vital human beings act in the communities to which they belong (like a school) and in the world at large, both “being an independent entity while also part of and responsive to a larger system.” They take on challenges as they come. “Because they are constantly experimenting and experiencing, they fail frequently,” the founders noted. “But they fail forward, learning from the situation.”

Cognitive coaches stimulate and prompt development of clients’ internal resources, which are the means for moving from an existing state to a desired one. In cognitive coaching theory, these internal resources include clients’ knowledge, skills, and attitudes, as well as five states of mind: efficacy, flexibility, craftsmanship, consciousness, and interdependence.

*Efficacy* is an “individual’s belief that she can successfully execute the behavior required to influence outcomes and a secure belief in one’s own coping abilities.”

*Flexibility* involves “the ability to step beyond yourself . . . seeing cause and effect . . . [and] discerning themes and patterns from assortments of information . . . even when some of the pieces are missing.”

*Craftsmanship* is the “drive for . . . clarity, refinement, precision . . . [, an] energy source . . . to generate and hold clear visions and goals.”

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40 Ibid. p. 18.
Consciousness is “to be aware of events both external and internal to oneself . . . [when people] monitor their own values, thoughts, behaviors, and progress toward their goals.”

Interdependence is the impulse for altruism—to “seek collegiality . . . and give [oneself] to group goals and needs.”

Motivational Interviewing: Stages of Change. The theory underlying motivational interviewing identifies six stages of individual change, ranging from a period before clients even entertain the notion of change, all the way up to a period when clients either maintain their new behavior or relapse into old behavior. The developers of this theory called their construct a ‘transtheoretical model,’ because it drew from several different disciplines. They labeled the stages of change as pre-contemplation, contemplation, preparation, action, maintenance, and relapse.

Some who subscribe to the theory point out that, although representations of the stages portray a logical progression, clients may experience the stages “in a nonlinear fashion.” Instead of moving neatly from one to the next, clients may cycle through stages or “regress” to an “earlier” stage.

The theory has been applied to changing behaviors as diverse as smoking and personal overspending. Several descriptions not only present the researchers’ characterization of the processes at work in each stage, but also suggest techniques that may be useful in coaching at each stage.

Pre-Contemplation. The client is not currently considering a change: ‘Ignorance is bliss.’

Contemplation. The client is ambivalent about change: ‘Sitting on the fence.’

Preparation. The client has some experience with change and is trying to change: ‘Testing the waters.’

Action. The client is practicing the new behavior for three to six months.

Maintenance. The client continues commitment to sustaining the new behavior for up to five years.

Relapse. The client resumes old behavior: ‘Fall from grace.’

Concerns-Based Adoption Model: Stages of Concern. Stages of concern describe a seven-stage progression that begins with an individual’s awareness and ends with refocusing. Specific stages within the progression are associated with one of three types of concerns: self, task, and impact.

42 Ibid, p. 133ff.  
45 Ibid.
A to Z Information from NJ-ELTA’s Coaching Module

The higher a client goes through the stages, the more a client’s focus evolves from concerns about self (personal: how will this affect me?) to concerns about task (management: how can I actually do this?), and ultimately to concerns about impact (how can I sustain or strengthen this?).

The stages of concern framework is based on research in the education field to obtain “information about people’s attitudes, or reactions, or feelings about a new program or a new practice. In other words, it is the affective domain--what they are thinking about it or feeling about it,” according to one of its developers.46 Designed to check on collective program implementation by assessing individuals’ reports on their concerns and their levels of use of an innovation, it also affords a way to track individuals’ readiness and engagement in personal change, the realm of coaching.

Self
0. Awareness (or Unconcerned). A client might say, ‘I think I heard something about it, but I’m too busy right now with other priorities to be concerned about it.’
1. Informational. A client might say, ‘This seems interesting, and I would like to know more about it.’
2. Personal. A client might say, ‘I’m concerned about the changes I’ll need to make in my routines.’

Task
3. Management. A client might say, ‘I’m concerned about how much time it takes to get ready to teach with this new approach.’
4. Consequence. A client might say, ‘How will this new approach affect my students?’

Impact
5. Collaboration. A client might say, ‘I’m looking forward to sharing some ideas about it with other teachers.’
6. Refocusing. A client might say, ‘I have some ideas about something that would work even better.’47

Your Turn

- What kinds of statements might you expect to hear from clients as they express each of cognitive coaching’s five states of mind?

- What are examples of statements you might make in response to clients’ statements at each of the motivational interviewing’s stages of change? At each of the concerns-based adoption model’s stages of concern?

- What insights does each theory provide for your coaching practice?

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For expanded definitions of cognitive coaching’s five states of mind and to view the “Desired State Map” that its founders developed, see “Expanded Definitions of Five States of Mind in Cognitive Coaching” (Resource R.1) and “Desired State Map” (Resource R.2). To experience the five states of mind in a different modality, you may wish to make up hand or body motions for each one.

To read more about motivational interviewing’s stages of change and its theoretical forebears, see “Transtheoretical Model.” For associated coaching and other support techniques that were developed for a collegiate athletics intervention program, see “Prochaska and DiClemente’s Stages of Change Model.”

For a fuller explanation of the Concerns-Based Adoption Model (CBAM), go to the SEDL (formerly Southwestern Educational Development Laboratory) website, where you can view a seven-minute video (or read the transcript) featuring Shirley Hord, one of the model’s developers, to introduce it. You can also read more about the stages of concern and related tools at “Stages of Concern,” as well as view (or read the transcript of) a six-minute video with Gene Hall, a co-founder of the model. For a sample of how stages of concern might sound in QRIS work, see “Individual Change Process: Stages of Concern” (Resource R.3).

Resources

1. “Expanded Definitions of Five States of Mind in Cognitive Coaching” (Resource R.1)
2. “Desired State Map” (Resource R.2)

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S. On the Way to Goal Setting and Action Planning

How does a coach know when a client is ready to formulate a plan of action? According to motivational interviewing, it’s when a client engages in ‘change talk.’ Coaches hear change talk as clients say they want and need to change, and say they also have a reason and the ability to change. Switch ‘want’ to ‘desire’ and shift the order of the terms, and the initial letters form the acronym ‘DARN’ for desire, ability, reason, and need. That’s the first part of change talk.

Coaches hear the second part of change talk as they guide clients through the making of an explicit plan of action. This part of change talk includes clients’ commitment to change, activation (a concrete plan for change), and taking steps to change. The acronym for this part of change talk is ‘CAT.’ Together, the two parts form ‘DARN CAT,’ an easy way to remember the components of change talk.50

But coaches cannot expect clients to engage in change talk immediately or spontaneously. Change talk typically emerges only after the coach and client build trust. Motivational interviewing operates on the theory that trust grows out of interactions that are consistently steeped in the ‘spirit’ of compassion, acceptance, collaboration (or partnership), and evocation (eliciting a client’s own motivation and resources for change).51

Motivational interviewing offers four strategies for ensuring that spirit infuses coach-client relationships and for helping clients reach change talk and beyond. These strategies or core skills are open-ended questions, affirmation, reflective listening, and summaries (asking the client to articulate the particulars of the plan).52 You might notice that the four strategies also form another acronym: ‘OARS.’

Your Turn

• To what extent do you think motivational interviewing applies to QRIS work? How, if at all, might you expect to modify or adapt its spirit, strategies, and listening for change talk in a QRIS context?

• What are some examples of change talk that you’ve heard in your coaching practice?

• Which kind of cat comes to mind as you contemplate ‘DARN CAT’ in the motivational interviewing sense: a cuddly kitty, a scrappy tom, a crouching tiger, or something else? In what ways does your ‘DARN CAT’ image embody the essence of change talk?

51 Ibid, p. 3.
A to Z Information from NJ-ELTA’s Coaching Module

- Where do you see similarities between motivational interviewing’s ‘OARS’ strategies and the strategies in cognitive coaching? Where are the differences? Can you see how they mesh despite any differences?

You may wish to glance through the CCNC Motivational Interviewing Resource Guide\(^5\) and refer back to the “Dancing, Not Wrestling” article\(^4\) for fuller explanations of the elements in motivational interviewing. Keep in mind that various practitioners’ formulations of motivational interviewing may differ somewhat, resulting in slightly discrepant wording of its principles and strategies.

Resources

1. *CCNC Motivational Interviewing (MI) Resource Guide,*

2. “Dancing, Not Wrestling,”

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T. Brief Action Planning

A motivational interviewing coach helps guide a client through the ‘CAT’ part of change talk (commitment, activation, and taking action steps). In the first decade of the 21st century, a psychiatrist designed a condensed planning process for this stage of motivational interviewing, which became known as brief action planning (BAP for short). In the second decade of the 21st century, he and a group of practitioner-researchers began training healthcare personnel on this process. They describe brief action planning as “a highly structured, patient-centered, stepped-care, evidence-informed self-management support (SMS) technique based on the principles and practice of Motivational Interviewing.”

They laid out the process in a brief action planning flow chart. In keeping with the ‘OARS’ strategies (open-ended questions, affirmation and reflective listening, and summaries) and the spirit of motivational interviewing, the bones of brief action planning are a series of articulated questions that a coach asks a client.

- The coach’s opening question (in a medical setting) is: ‘Is there anything you would like to do for your health in the next week or two?’ What the coach does next depends on the client’s response. If the client says no, the coach says the coach will check back next time they meet. If the client isn’t sure, the coach asks permission to share a few ideas. If the client already has an idea or arrives at an idea, the coach works with the client to frame a plan. The plan should bear all the marks of SMART goals by being specific, measurable, attainable, relevant, and timely. The coach can prompt the client for precise details as to exactly what the client will do, as well as where, how often, how long, and starting when.

- The coach’s next question probes for how sure the client is about the plan: ‘How confident do you feel about carrying out your plan, on a scale of ‘0’ (not at all sure) to ‘10’ (totally sure)?’ Again, the coach’s next move depends on the client’s response. If the client identifies a confidence level below ‘7,’ the coach engages the client in problem solving by asking what might be done to raise the client’s confidence above ‘7.’ For clients who lack ideas for raising their confidence level, the coach can ask to share some ideas. The aim is for the client reach a confidence level of ‘7’ or higher on the strength of the ideas for improving the practicability and probability of implementing the plan.

- When the client indicates a confidence level of ‘7’ or higher, the coach asks the client to restate the plan. The client’s summary should include all the specifics that support the likelihood of its implementation.

- The coach’s last major question in this series is about monitoring implementation of the plan: ‘Would it be helpful to set a time to check back on how things are going with your plan?’ Some coaches precede this question with a more open-ended question about

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how the client intends to monitor progress. They may also press for details about with whom, how often, and in what medium.

Brief action planning also provides two scripted questions for the coach’s follow-up with the client. The first follow-up question is: ‘How did it go with your plan?’ The coach continues to apply the spirit and strategies of motivational interviewing in this conversation, offering affirmation for full and partial completion of the plan, and compassion for non-implementation. In any case, the coach’s next question is, ‘What would you like to work on next?’, and the cycle continues.

**Your Turn**

- What stands out for you about brief action planning?
- How could you envision using brief action planning in your coaching practice?
- On a scale of ’0’ to ‘10,’ how confident do you feel about using brief action planning in your coaching practice? If you rate your confidence under ‘7,’ do you have any ideas about what might raise your confidence?

You may wish to review the “Brief Action Planning Flow Chart” and the associated narrative in the Brief Action Planning White Paper, and to watch the “Brief Action Planning Pediatric Example” video. The video takes viewers inside a consultation between a coach (a pediatrician, in this case) and clients (Ravi, a 10-year-old boy, who is the primary client, with his mother). Including a brief introduction for viewers, the whole video lasts just over four minutes.

As you watch, you may wish to transcribe or make notes on what the coach says. Your notes will help you ascertain which of the main brief action planning questions the coach managed to ask and to examine how those questions actually were expressed in a real-life situation. See the Centre for Collaboration, Motivation and Innovation website at [http://www.centrecmi.ca](http://www.centrecmi.ca) for additional videos on brief action planning.

If you have an opportunity to partner with another QRIS coach, you may also wish to think of a QRIS coaching situation and co-author an imaginary dialogue that both follows the brief action planning flow chart and applies the spirit and strategies of motivational interviewing.

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A to Z Information from NJ-ELTA’s Coaching Module

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A to Z Information from NJ-ELTA’s Coaching Module

U. Coaching Light or Coaching Heavy

There are two kinds of coaching, according to coaching expert Joellen Killion: coaching light or coaching heavy. In practice, however, Killion says, “coaches use some similar strategies for coaching light and heavy. For example, they may hold pre- and post-observation meetings with teachers before and after visiting the teacher’s classroom.”

So what’s the real difference and what difference does it really make?

Killion defines coaching light as “emphasiz[ing] the sense of [the client] being supported rather than the sense of producing results.” Coaching light aims to support the implementation of particular strategies related to a topic of the client’s choosing “without reference to anything other than [the client’s] preference.” Feedback is general, starting with a client’s impression of ‘how things went.’ Planning for next steps might consist of the client brainstorming about possible strategies for future implementation.

In contrast, coaching heavy “means robustly engaging in the work of coaching with a laser-like focus on improving student learning.” In coaching heavy, the emphasis is on enhancing professional expertise. The focus or topic for heavy coaching is a matter of serious exploration and discussion between coach and client, and it takes into consideration standards, demands of the adopted curriculum, and specific needs and goals of the site/center and of the client individually. Coaching heavy is data-based in terms of feedback and evidenced-based in terms of next steps.

Killion clearly favors coaching heavy. She rejects the contention that coaching light, with its relatively diffuse and uncritical relationship-building properties, can or must be the prelude for coaching heavy. It appears that in Killion’s K-12 education world, where student learning is paramount, coaching heavy is what all coaching should be.

Your Turn

• How do coaching light and coaching heavy translate into the world of early care and learning, and QRIS initiatives more specifically?

• What does (or would) coaching heavy look like in your coaching practice? What place do you see for coaching light—if any—in your coaching practice?

• What resources or policies would have to be in place for you to increase your implementation of coaching heavy?

60 Ibid: all quotations and content, pp. 8-9.
A to Z Information from NJ-ELTA’s Coaching Module

Resources

V. What Coaching Is Not

What don’t coaches do? Or what shouldn’t coaches do?

Coaches usually are highly experienced and competent individuals who have successfully filled positions like those their clients currently fill. Coaches ‘been there and done that.’ They know a lot. They know the pressures and demands on directors and staff in various kinds of sites/centers, for example. They know that directors and staff can feel like there isn’t enough time or enough hands to get everything done.

So it seems fair to ask, ‘If the coach’s job is to help clients, why would there be anything that coaches don’t do?’

Among the things that strengths-based coaches who follow the reflective coaching cycle also know is that the client must do the heavy lifting. In ‘pure’ coach-client relationships, coaches facilitate clients’ thinking and guide clients toward setting goals, making plans, taking action, evaluating the impact of their actions, and setting new goals for improvement and growth. Coaches help clients do the hard work of framing their issues and discovering their own solutions. Coaches do not do the work for them.

Meanwhile, coaches are working hard, too, as they exercise the discipline of coaching. They listen and ask questions. They bring resources and request clients’ permission to share those resources with them. They evaluate the progress of the coaching.

The discipline of coaching also entails defining and adhering consistently to appropriate boundaries, no matter how tempting it may be to cross them. We can imagine a QRIS coach’s internal dialogue: ‘How simple it would be for me to do this one thing! How much it would help out! Besides, then it would be done right!’

Since QRIS coaches are rarely in pure coach-client relationships with directors, it is inevitable (and appropriate) that QRIS roles will go from coaching to consultation or technical assistance, and back again. Knowing what the boundaries are for each role that a QRIS coach plays and being clear with clients about which role they are playing at any given time are important coaching tasks. In addition, coaches are obligated at all times to intervene when they see illegal or unsafe practices taking place.

There are few things that coaches categorically should not do. Experts generally agree that what not to do includes transgressing the boundaries of the agreed-upon role (such as acting as a supervisor), supplying content and judgments for clients’ personnel evaluations, violating confidentiality, and doing clients’ work in a coaching relationship.

Your Turn

• What else should coaches not do?

• Can you think of situations in which a QRIS coach might knowingly do some of the coaching ‘don’t do’s’?
How can a coach get back on track with a client if the coach has stepped over the boundary into what a coach should not do?

You may wish to look over a list of what coaches don’t do, which we adapted from a Spokane Public Schools coaching manual (Resource V.1).

You may also wish to watch the “Bad Coach” portion of the video entitled “Bad Coach/vs./Good Coach: Empowerment.” It lasts just over one minute. You may want to ask yourself what the coach does that makes her a bad coach. Where does the encounter go wrong? How could it have gone differently?

To see what the video considers the counterpoint to the “Bad Coach,” you can view the two-minute “Good Coach” portion. What does the “Good Coach” do? Do you have any ideas for what the “Good Coach” might do differently the next time to be an even better coach?

Resources

1. “What Coaching Is Not” (Resource V.1)

2. “Bad Coach/vs./Good Coach: Empowerment,”
https://www.youtube.com/watch?v=82gVD0Vk7Rw (1:13 for “Bad Coach”; 2:00 for “Good Coach”). Note that scenes in the video are simulations taped during a workshop in which there was a lot of ambient noise.

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W. Adult Learning Principles

Many QRIS coaches design and conduct professional development sessions for site and center directors, staff, and parents, in addition to their coaching duties. Most experts agree that adult learning principles have something important to say about coaching and other types of professional development. There is, however, no single formulation that defines adult learning principles. There is also no single way to refer to them, and so they are sometimes labeled principles and sometimes a theory, a framework, or simply the characteristics of adult learners.

Malcolm Knowles was a major figure in developing the adult learning field during a teaching, administration, and publishing career that spanned almost 50 years, starting in 1950. His assumptions about adult learners—as distinct from young learners—included the following:

**Self-concept.** Adults understand themselves to be independent and expect to be self-directed.

**Experience.** Adults bring past experience that can be tapped for future learning.

**Readiness to learn.** Adults are disposed to learn things that relate to their current life roles.

**Orientation to learning.** Adults are interested in the application of learning to concrete problems or situations in contrast to abstract content.

**Motivation.** Adults have their own intrinsic or internal reasons for learning.

With these assumptions as a jumping-off point, many others have developed how-to’s or guidelines for those who design or facilitate adult learning experiences. One such set of guidelines, adapted from a Head Start mentoring manual, includes the following characteristics of effective adult learning experiences:

- involve adults fully in understanding, interpreting, and sharing new concepts through interaction and collaboration;
- build on adults’ knowledge and experiences;
- integrate new knowledge with what adults already know;
- acknowledge adults’ individual and cultural strengths; and
- center on solving problems.

Your Turn

What examples of powerful adult learning experiences come to mind from your own involvement as coach, client, professional developer, or participant? To what extent do those experiences conform to the assumptions about adult learners or the characteristics of effective adult learning experiences listed above?

Which characteristics of effective adult learning experiences might you want to add to those identified above?

Which characteristics of effective adult learning experiences do you apply most consistently or readily in your coaching practice?

Which characteristics of effective adult learning experiences do you generally find most challenging to apply in coaching or professional development?

You may wish to view the video “Andragogy (Adult Learning).” (Andragogy is a term Knowles invented to denote adult learning.) The video runs under nine minutes and includes explanations, along with a brief critique of Knowles’s ideas and how he amended them over time. For a scholarly article that presents recent research, you might try “Characteristics and Consequences of Adult Learning Methods and Strategies.”

In an entirely different vein, “17 Tips to Motivate Adult Learners” suggests design strategies for working with adult learners, both in person and online.

Resources

1. “Andragogy (Adult Learning),” https://www.youtube.com/watch?v=vLoPiHUXbEw (8:27)


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X. Evaluation of Coaching

Evaluation is a critical stage in the reflective coaching cycle. For coaches, evaluation has two parts: evaluating the progress of coaching and evaluating the development of the coach.

Evaluating the progress of coaching. The first part—evaluating the progress of coaching—includes monitoring the content of sessions and the movement toward client goals. The evaluation can be addressed by coach and client together. The frequency depends on the purpose and style of coaching. In cognitive coaching, for example, each problem-solving session concludes with the coach asking the client, ‘What’s clearer for you now?’

Coach and client may engage in evaluating the progress of coaching periodically instead (or in addition). Evaluation can be initiated after a few sessions and every few sessions after that; when the coaching seems to have reached a new stage; or when the coach or the client perceives that a problem has arisen in the relationship.

Third parties may also have an interest in evaluating the progress of coaching and may impose a schedule for evaluation. Some QRIS initiatives require QRIS coaches to enter the number of contacts between coach and client, types of assistance provided, and other information in an online database.

Decisions have to be made as to the format of the notes or records that the coach will keep, how the coach will store the records, and with whom and how the coach will share them, if at all. Although some of these decisions might sound merely mechanical, they may significantly affect the coach-client relationship. Coaches may have the authority to decide on some of the format questions—which types of information to track, whether to use checklists or open-ended responses, whether to hand-write or enter data electronically, for example—and may be able to choose to do whatever is easiest and most convenient for them. If the agencies that sponsor QRIS coaching have fixed requirements for documentation, coaches may also have the option to augment the required documentation with their own notes. Two criteria for decisions about storage and sharing of coaching information are preserving client confidentiality and ensuring that clients gain access to relevant resources.

Regardless whether clients or third parties participate in evaluating the progress of coaching, coaches themselves have a strong interest in tracking their work with individual clients. At a minimum, information that the coach might want to record after each session includes the focus or topic of the session, a summary of the discussion (perhaps also noting what veteran coach Elena Aguilar calls the stories that clients tell⁶⁹), action steps to be taken by the coach and by the client, and the date of the next session. This kind of record assists the coach in preparing for the next session and may also serve as the source for the coach in sharing—selectively and without breaching confidentiality—with appropriate third parties.

Evaluating the development of the coach. The second part of evaluating coaching has to do with assessing the coach’s performance and nurturing the coach’s development. It’s about how well the coach is doing, which strategies the coach chooses to use, how appropriate those

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choices are, and how skillfully the coach implements them. It’s also about how the coach grows in skill and wisdom as a coach.

Some agencies that sponsor coaching have established protocols for the evaluation of coaching. They may schedule regular reviews for the coach and the supervisor, or periodic professional problem-solving or peer support sessions. Some agencies might provide coaches for coaches.

In settings where coaches work more like solo practitioners, they may rely on their own reflection and/or may enlist partners with whom to engage in reflection. Some modes for reflection include journaling; meetings with a buddy coach face to face, or via phone or Skype; or the sharing of summaries or redacted written reflections in person or via email with one or more thought partners. The need to balance convenience and efficiency while preserving confidentiality in the storage and sharing of data must be considered in these settings as well.

In addition to reflection, feedback and additional learning can contribute to coaches' ongoing professional development. Where coaches work in tandem or have their own coaches, they may seek clients’ permission to videotape and share the videos of coaching sessions for the purpose of enhancing their professional learning. Coaches may also participate in professional learning communities and/or in in-person, online, or hybrid coursework to continue developing their coaching expertise.

**Your Turn**

- What kinds of documentation do you (or would you) find useful in your coaching practice?

- How would you make use of documentation on the progress of coaching in an ideal world? In the real world? If there’s a difference, can you think of some things you could do to bring the real world closer to your ideal?

- How do you monitor your own growth as a coach?

You may wish to check out the “Coaching Contact Summary” (Resource X.1), a two-sided sample form that we adapted from a model that is used in collaborative planning for early childhood interventions. Side one contains the plain facts about a coaching session, the ‘who, what, when, where, and how’ of the coach-client interaction. Side two is designed for reflection. The left-hand column lists the eight stages that its authors have identified to describe the progress of consultations, which we have modified slightly for coaching. The right-hand column is blank, so that coaches can write reflections, which may or may not be prompted by the descriptions of the stages.

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Resources

1. “Coaching Contact Summary” (Resource X.1)
Y. Coaching Ethics

No discussion of coaching would be complete without talking about ethics. Even in the space that coach and client consensually demarcate by specific coaching goals and a focus on specific topics, coaching grants a coach admission to the private realms of a client’s thoughts and feelings, where a client may be exposed and vulnerable. Coaching has the potential to change lives. Good coaches respect the potential intimacy and power of coaching. They welcome ethical standards and guidelines for the field as a whole and for their own practice.

We may legitimately ask, however, ‘Which standards?’ and ‘Whose guidelines?’ Several organizations and institutions have developed codes of ethics with pieces that are relevant to QRIS coaching, but none may be a perfect fit.

National Association for the Education of Young Children. At present, the closest fit appears to be the “Code of Ethical Conduct: Supplement for Early Childhood Adult Educators” from the National Association for the Education of Young Children (NAEYC), adopted in 2004. Some state-level organizations have endorsed these standards. (For example, Professional Impact New Jersey (PINJ) has embraced them.) This NAEYC code states that its “primary emphasis” is on issues that educators in two- and four-year institutions of higher education are likely to encounter, but that it is “also applicable” to those who provide “mentoring to adults in early childhood care and education settings.” Its “core values”—respect for the critical role of a well-prepared workforce to support the development and learning of young children and practice based on current and accurate knowledge in various “relevant disciplines”—apply fully to early childhood coaches. Less so, however, do some of the ideals and principles that relate to institutions of higher education and other sponsors of training, practicum sites, and so on. The special dynamics of coach-client relationships differ from those between teachers and students, and are not directly addressed in these standards. Other NAEYC codes of ethics that have somewhat relevant sections are those for early childhood program administrators, early childhood professionals, and an umbrella statement of commitment.

Learning Forward. “Standards for Professional Learning” from Learning Forward (formerly National Staff Development Council) also contain some standards that pertain to coaching. The principal audience for this document, however, is professional developers in school districts, who may or may not incorporate coaching in their practice. One of its chief areas of focus is on ensuring that professional development is systemic, that its content is coherent and aligned across whole systems, and that participants are active rather than passive learners. The section that may be the most pertinent for coaching focuses on implementation, specifically on sustaining implementation of professional learning through ongoing support, and it is most clearly applicable to instructional or practice-based coaching.

72 Ibid, 1.
74 Ibid.
75 Ibid.
International Coach Federation. The International Coach Federation’s code of ethics focuses squarely and exclusively on coaching—though it seems geared especially to independent life or executive coaches. Accordingly, many of its standards address business and professional ethics (such as advertising claims, plagiarism, compensation, contracts, and conflicts of interest). The most pertinent statements appear in the section on professional conduct with clients and have to do with setting explicit goals and boundaries, relating to clients’ sponsors or supervisors, confidentiality, recognizing when to refer, and clients’ rights to terminate the relationship.\(^7\)

Your Turn

- How would you express the core ethical principles in coaching?
- Are there other models that could inform the development a code of ethics for QRIS coaching? What specific standards or provisions seem right for coaching?

You may wish to compare and contrast the relevant portions of the three codes of ethics discussed above.

Resources

1. National Association for the Education of Young Children’s “Code of Ethical Conduct: Supplement for Early Childhood Adult Educators,”

2. Excerpts from Learning Forward’s “Implementation” in Standards for Professional Learning (Resource Y.1)

3. International Coach Federation’s “Code of Ethics,”
   http://coachfederation.org/about/ethics.aspx?ItemNumber=854

\(^7\) International Coach Federation, “Code of Ethics,”
Z. Putting It All Together

If you’ve made your way through *A to Z Information from NJ-ELTA’s Coaching Module*, you have encountered a number of basic ideas that support QRIS coaching.

This might be a good time to pause and reflect. Now that you’ve met the whole set of ideas, you might find it valuable to revisit them briefly one by one and determine where you are with each idea.

Your Turn

- What one or two ideas do you take away from each section?
- What one or two questions do you still have about each section?
- What one or two strengths do you have that pertain to each section? One or more challenges?
- What stands out for you overall?
- What would you like to do in the next two or three weeks to practice some of the skills and/or learn more about some of the concepts you’ve come across in *A to Z Information*?

You may wish to use the “Review and Reflection” worksheet (Resource Z.1) for jotting down your responses to the *Your Turn* questions above.

You may also find it helpful to record your plans for practice and/or further learning on “My Implementation Plan” (Resource Z.2) after you review and reflect on each section of *A to Z Information*.

You can consult the “*A to Z Information* Resource List” (Resource Z.3) for full citations of the materials referenced in *A to Z Information*.

Resources

1. “Review and Reflection” worksheet (Resource Z.1)
2. “My Implementation Plan” (Resource Z.2)
3. “*A to Z Information* Resource List” (Resource Z.3)