# TEMPLATE 1: PLANNING COACHING

### Contracting for Coaching

Coaching contracts are used widely in professional and/or formal coaching and are an important aspect of developing trust. As the context of your coaching practice relates to the development of a coaching culture within an organisation, formal contracts may be less suitable. As part of planning your coaching practice however, the core aspects of a coaching contract should be considered, as embedding a coaching culture requires a shared understanding. For these reasons, it’s important to plan the coaching thoughtfully. As this is part of your assessment, you will submit a clear coaching plan, but for future practice you may prefer to do this less formally.

This document will help you to plan, structure, and agree the coaching sessions. It will provide evidence for the achievement of Learning Outcome 2 ‘Plan, conduct, and reflect on a series of coaching sessions’. Please make a copy of this template for each individual you plan to coach.

Remember that the coaching is totally confidential and you should not refer to the coachee by name. Please use a suitable reference to identify the person you are working with for the purposes of the assessment.

*Please delete all guidance before submitting: this is the text in the plan that is in grey italics*

### Coaching Plan

**Name of Coach/Mentor:**

**Coachee Reference:** *instead of name*

**Date of first coaching session:**

**Total number of coaching sessions planned:**

**Planned duration of sessions:** *are you going to book longer or shorter meetings?*

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| **Brief profile of the coachee** |
| *Think about who you will coach and what you know about them. Give a brief overview of their age range, gender, education, job role, and family circumstances (if relevant)*  *Optional: If your organisation uses any diagnostic tools as part of their training, or if the coachee has used any their personal development, you may want to note that here. Or you might want to ask if they are interested in engaging with any of the diagnostic tools you may be aware of or have been introduced to as part of the programme. E.g. their preferred learning style, or results of Goleman’s Leadership Styles questionnaire. Tools that are widely used but not part of the programme, such as Gallup Strengths Finder or Myers-Briggs, can be included here if they are used by the coach, coachee, or organisation.* |
| **What are the anticipated benefits of coaching for this individual?** |
| *What does the coachee want to achieve? What are their goals and development needs and how might the coaching help? If you already work with the coachee, or are their line manager, you may be aware of this as part of your review process. If you are coaching someone that is not in your team, that you do not line manage, have an initial discussion about the context and purpose of the coaching conversations you plan to have.* |
| **The Coaching Relationship** |
| *What is your relationship with the coachee? Are you their line manager or colleague or is it someone you work with from another team? How well do you know them? How formal will the coaching arrangement be? Is it part of recognised CPD activities for them and/or you? Is the coaching related to a practical project or area of work? What is your shared understanding of the relationship you will have as a coach/coachee?* |
| **Responsibilities and context** |
| *As these coaching sessions will be used as part of your formal assessment for the qualification, it’s important that the coachee is aware of the context. Here you should outline how and when you have clarified this context. The communication with this coachee should include clarification of your level of experience in coaching, what the assessment/qualification entails, and what you hope to achieve by completing it. Indicate what you will be responsible for (e.g. ensuring confidentiality, taking notes, time keeping, and making appointments etc) and what you are asking of them (e.g. attend when scheduled, think carefully about what they want to focus on, engage fully, to agree to the anonymised sessions being used for the assessment). Summarise and briefly reflect on this here.* |
| **Where will you meet for the sessions/conversations, or will they be online?** |
| *Describe this and briefly indicate why the choice is suitable.* |