

LEVEL 5 AWARD IN PROFESSIONAL TEAM COACHING

Syllabus | June 2023 | Version 2

VERSION CONTROL

Document Version	Date Revisions Made
Version 1	June 2022
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QUALIFICATION OBJECTIVE

This qualification is designed to provide an overview of team coaching for professional coaches. This qualification will provide skills and knowledge to enable professional coaches to deliver impact, behave ethically and demonstrate a commitment to continual learning and development.

This qualification has been designed for practising or aspiring Professional Coaches, who have the ability to apply their learning, to develop their skills in this area and/or progress onto further learning.

Extensive research has been undertaken to ensure that these qualifications reflect tasks and activities of managers in the aforementioned roles in the workplace. Sources of information include, but are not limited to:

- 1 Comparability to existing Coaching programmes
- 2 CMI Professional Standards
- 3 Stakeholder consultation
- 4 Mapped to the Professional Apprenticeship Standard ST0809 AP01 Professional Coaching

Team coaching brings together an existing team of people who have shared goals and purpose. This type of coaching can impact on organisational success. It has the power to optimise the effectiveness of a team, promoting trust, collaboration, cohesion and inclusion in the pursuit of a shared goal.

Professional coaching delivered to teams is a strategy increasingly used by organisations to support and develop their staff.

Through the process of working with a Professional Coach, the team and its members are able to benefit from the wisdom and experience of each other.

On successful completion of the unit, Professional Coaches will understand the principles of professional team coaching and will be able to plan, deliver and manage coaching for teams.

QUALIFICATION TITLES

The titles given below are the titles as they will appear on the qualification when awarded to the Learner. The qualification reference number is the number allocated to the qualification by the Regulator at the time of submission, which confirms that this is a regulated qualification on the RQF and on the Register. The CMI code is the code which should be used when registering Learners with CMI.

Therefore all CMI Centres must use the full qualification title as per below when advertising or making reference to the qualifications.

CMI Code	Qualification Title	Qualification Reference Number
5A38	CMI Level 5 Award in Professional Team Coaching	610/0900/3

KEY DATES

These qualifications are regulated from 1st June 2022 and the operational start date in CMI Centres is 1st June 2022. The qualification review date is 31st May 2027.

PROGRESSION OPPORTUNITIES

CMI would recommend the below qualifications as a possible progression route, once complete the Management Coaching and Mentoring qualifications:

- CMI Level 5 Professional Coaching Practice
- CMI Level 5 Principles of Professional Coaching
- CMI Level 5 Professional Mentoring Practice
- CMI Level 6 Professional Coach Supervision
- CMI Level 7 Qualifications in Leadership Coaching and Mentoring

Please see also the CMI Website for further information on CMI's portfolio of Level 5 qualifications.

Learners may also wish to further their ongoing personal and professional development by accessing other CMI qualifications, such as the CMI Level 5 Qualifications in Management and Leadership.

ENTRY AND REQUIREMENTS

This qualification can be offered to Learners from age 19. CMI does not specify entry requirements for this qualification, but Centres are required to ensure that Learners admitted to the programme have sufficient capability at the right level to undertake the learning and assessment.

CMI Centre must ensure Learners are recruited with integrity onto appropriate qualifications that will:

- meet their needs
- enable and facilitate learning and achievement
- enable progression

In order to achieve this, the CMI Centre will need to:

- Provide relevant programme information, guidance and advice, to enable informed Learner choice
Publish entry and selection criteria
- Demonstrate that Learners are recruited with integrity
- Carry out comprehensive Learner induction that:
 - addresses programme and organisational requirements
 - explains Learner facilities
 - identifies Learners' development needs
 - develops an Individual Learning Plan

The qualification is offered in the medium of the English Language.

DEFINITIONS

Total Qualification Time (TQT) is defined as the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required, in order for a Learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification. Total Qualification Time is comprised of the following two elements –

- a) the number of hours which an awarding organisation has assigned to a qualification for Guided Learning, and
- b) an estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the immediate supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Total Unit Time (TUT) is defined as the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required, in order for a Learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a unit.

Guided Learning Hours is defined as the activity of a Learner in being taught or instructed by – or otherwise participating in education or training under the Immediate Guidance or Supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Immediate Guidance or Supervision is defined as the guidance or supervision provided to a Learner by a lecturer, supervisor, tutor or other appropriate provider of education or training –

- a) with the simultaneous physical present of the Learner and that person, or
- b) remotely by means of simultaneous electronic communication

Credit value is defined as being the number of credits that may be awarded to a Learner for the successful achievement of the learning outcomes of a unit. One credit is equal to 10 hours of TQT.

Rule of Combination is defined as being a rule specifying the combination of units which may be taken to form a particular qualification, any units which must be taken and any related requirements.

QUALIFICATION STRUCTURES

RULES OF COMBINATION

There are minimum requirements to achieve each qualification within this suite. The minimum requirements are based on the boundaries outlined in Ofqual's Guidance to the General Conditions of Recognition, namely Condition E2.

CMI LEVEL 5 AWARD IN PROFESSIONAL TEAM COACHING

Learners must complete the following unit to a minimum of 100 TUT hours, 10 credits to achieve this qualification.

The minimum GLH is 30 hours.

Unit Code	Unit Title	GLH	TUT	Credits
536	Professional Team Coaching	30	100	10

QUALIFICATION DELIVERY

CMI does not specify the mode of delivery for its qualifications at Level 5; therefore CMI Centres are free to deliver the Level 5 qualifications using any mode of delivery that meets the needs of their Learners. However, CMI Centres should consider the Learners' complete learning experience when designing the learning programmes.

CMI Centres must ensure that the chosen mode of delivery does not unlawfully or unfairly discriminate, whether direct or indirect, and that equality of opportunity is promoted. Where it is reasonable and practical to do so, it will take steps to address identified inequalities or barriers that may arise.

Please ensure that the content of the Centre Delivery plan is approved by the CMI Quality Manager.

For CMI requirements regarding Tutor/Deliverers of CMI qualifications please refer to the CMI Centre Handbook for more information.

ACCESSIBILITY OF CMI QUALIFICATIONS

There may be incidents where Learners may require special consideration and reasonable adjustments to the delivery and assessment of qualifications. In the event of this, Centres should notify their allocated Quality Manager and CMI.

Further information, please see the [CMI Reasonable Adjustments Procedure](#) and the [CMI Special Consideration Procedure](#).

RECOGNITION OF PRIOR LEARNING

There may be occasions where Learners request Recognition of Prior Learning (RPL). This can be applied by Centres. Further guidance on RPL and exemptions can be found in [CMI RPL policy](#).

The criteria of the assessment of a CMI qualification will be to meet the assessment criteria detailed within each individual unit.

The primary interface with the Learner is the Assessor, whose job it is to assess the evidence presented by the Learner. The Assessor should provide an audit trail showing how the judgement of the Learner's overall achievement has been arrived at.

The CMI Centre's assessment plan, to be agreed with the Quality Manager, should include a matrix for each qualification showing how each unit is to be assessed against the relevant criteria and which specific piece or pieces of work will be identified in relation to each unit. It should also show how assessment is scheduled into the delivery programme.

In designing the individual tasks and activities, CMI Centres must ensure that:

1. the selected assessment task/activity is relevant to the content of the unit
2. there are clear instructions given to Learners as to what is expected
3. Learners are clearly told how long the assessment will take (if it is a timed activity), and what reference or other material they may use (if any) to complete it
4. the language used in the assessment is free from any bias
5. the language and technical terms used are at the appropriate level for the Learners

In addition to the specific assessment criteria in each unit, the Learner's work must be:

- accurate, current and authentic
- relevant in depth and breadth

and must also show the Learner's:

- clear grasp of concepts
- ability to link theory to practice, and
- ability to communicate clearly in the relevant discipline at the expected level for the qualification

LEARNER AUTHENTICITY

Learners are required to sign and date a Statement of Authenticity. The learner statement confirms the evidence submitted is all their own work and has not been completed by a third party. Additionally the learner statement confirms the evidence provided has been completed in accordance with CMI approved instructions.

Centres are required to complete a Centre Statement of Authenticity to confirm the learner is registered on a Chartered Management Institute (CMI) programme of study.

ASSESSMENT GRADING

The grading system for CMI qualifications is "Pass/Refer". The external moderation of Learners' work confirms that the required criteria for achievement have been met.

CMI Centres are, however, free to apply their own grade scales, but it must be understood that these are completely separate from the CMI qualification.

It is important to ensure consistency of assessment, and that demands made on Learners are comparable within and between CMI Centres. A number of assessment methods can be used.

For CMI requirements regarding Assessors and Internal Verifiers of CMI qualifications please refer to the

SUGGESTED ASSESSMENT METHODOLOGIES

CMI does not state the assessment method for its qualifications, instead supporting Centres in creating assessment plans to suit the needs of Learners and/or Employers. It is encouraged that a range of methods are used to ensure that all Learning Outcomes and Assessment Criteria are met, and to enhance Learners' development.

In some instances, as well as written work, use can be made of technology. It is important, however, to ensure sufficient traceability for assessment and verification

The following table presents an overview of the type of activities that partners may use to assess each unit. Further details are provided in the 'Recommendations for Assessment' section of each unit specification.

		Report	Reflective Account	Guide	Plan	Work Based Evidence
536	Professional Team Coaching	X				X

WORD COUNT AND APPENDICES

The written word, however generated and recorded, is still expected to form the majority of accessible work produced by Learners at Level 5. The guideline word count for units within this qualification are summarised below, and vary depending on size and content of the unit. There is a 10% allowance above/below these guidelines. For more information, please refer to the CMI Assessment Guidance Policy

The table below sets out the word count, by unit, within these qualifications. Word count has been set based on the content being covered within each unit.

Unit	Title	Word Count
536	Professional Team Coaching	3500 + work based evidence

Learner work should aim to minimise the amount of unnecessary attachments or appendices. Information that is essential to the Learners work in order to meet the learning outcomes and assessment criteria should be included within the main body of the report. However, CMI understands that from time to time a Learner may need to include additional supporting information which enhances the overall work and it is recommended that it is kept to a minimum and does not over-exceed.

EXTERNAL MARKING

As part of our dedicated service, Chartered Management Institute (CMI) Awarding Body offers the opportunity for all Centres to have their Learner's assignments externally marked.

Some CMI Centres choose to send one assignment of the qualification to be externally marked, as it gives the Learner a CMI quality stamp, as it is marked and assessed by the Awarding Body.

This service provides CMI Centres with a simplistic, professional and cost effective way to get their CMI Learner's work marked and certificated within a six week period. Please refer to the fee's guide for current pricing.

APPEALS AGAINST ASSESSMENT DECISIONS

In the event that a Learner wishes to appeal against an assessment decision, they can do so by following outlined procedures.

Where an assessment decision has been made by CMI Centre, Learners must follow the Centre/s own Appeals Procedure in the first instance. If this procedure has been exhausted and remains unresolved, Learners may log on a Stage 2 appeal with CMI.

For further information, please see CMI's Enquiry and Appeals Procedure.

CMI SERVICES - SUPPORTING CMI QUALIFICATIONS

CMI MEMBERSHIP

If an individual is not already in membership at the time of registering on a CMI qualification then your Learner will be provided with free Affiliate membership of the CMI through until the completion of their studies. For details of the benefits of membership please [click here](#). There may be the opportunity to upgrade during the Learners studies dependent on successfully completing an assessment with CMI.

CHARTERED MANAGER

Chartered Managers are consistent high performers, committed to current best practice and ethical standards.

A unique designation, exclusively awarded by the Chartered Management Institute, Chartered Manager embodies a professional approach to management through knowledge, competence, professional standards and commitment to continuing professional development (CPD).

To find out more about how to become a Chartered Manager please [click here](#).

STUDY RESOURCES

ManagementDirect

<https://members.md.cmi.org.uk>

It's fast, comprehensive and free to members

ManagementDirect is a complete online library of comprehensive and up-to-date material that addresses current management practice, supports studying and those looking to develop their skills.

- 231 Management Checklists and 60 Management Thinker profiles
- One page overviews of key Management Models
- Multimedia resources – 200 Leader Videos
- CMI research and Professional Manager articles
- Authoritative definitions of management terms
- Over 11,000 articles and 9000 e-books to read online when you need them
- Learning Journey playlists for many units giving you easy access to resources specifically selected to support your studies
- Resources to develop your Study Skills, including factsheets on assignment writing, references and citations, learning styles, note taking and avoiding plagiarism.

All these resources are freely available to members from one source. Definitions give you a headline understanding of the topic; Checklists and Models provide the essentials; and books and articles enable you to research further. Depending on your need you choose how far you want to go.

E-journals

For in depth research try our e-journals service

CMI has joined forces with EBSCO Information Services to offer members access to Business Source: Corporate, a database providing direct access to articles on management and business from a range of academic journals and business magazines. Members also have access to country, company and industry reports from leading providers.

Access to Business Source Corporate is through ManagementDirect.

Online CPD

CPD can take many forms, but the most important feature of any activity you undertake is that there are clear learning outcomes. In many cases these may enable you to have a direct impact at work. Our online CPD scheme enables you to record your learning objectives and the activities you have undertaken and encourages you to assess its impact in your role as a manager. Print reports for your reviews, appraisals or interviews.

Access to CPD is through ManagementDirect.

The units within these qualifications are different to other qualifications, and so the following summarises some key features:

- TUT refers to Total Unit Time. TUT is set based on estimated time expected for the average learner to be taught the content via formal Guided Learning, additional informal learning and preparation and completion of assessment.
- GLH refers to Guided Learning Hours. GLH is the estimated contact time the average learner has with tutors, trainers or facilitators as part of the learning process, it includes formal learning including classes, training sessions, coaching, seminars, live webinar and telephone tutorials, e-learning which is supervised. It is important to note that this also includes assessing learner's achievements for competency based assessments.
- The use of e.g within the unit content means an abbreviation for "for example".
- Key words which highlight knowledge, skills and behaviours which will be developed
- Indicative content has been developed to support the learner to understand the aims of learning outcomes and assessment criteria. It can also be used by tutors to develop lesson plans and schemes of work.
- Recommendations for Assessment which provides a range of suggested assessment activities for actual or aspiring managers and leaders
- Relationships to frameworks such as Chartered Management Consultant Competence Framework
- Suggested reading/web resource materials developed to compliment the unit content. The primary resource/research tool referred to is ManagementDirect

It is recommended that Learners have sight of each unit of study in preparation for assessment.

The table below summarises the units within these qualifications:

<p>536 Professional Team Coaching</p>	<p>Team coaching brings together an existing team of people who have shared goals and purpose. This type of coaching can impact on organisational success. It has the power to optimise the effectiveness of a team, promoting trust, collaboration, cohesion and inclusion in the pursuit of a shared goal.</p> <p>Professional coaching delivered to teams is a strategy increasingly used by organisations to support and develop their staff.</p> <p>Through the process of working with a Professional Coach, the team and its members are able to benefit from the wisdom and experience of each other.</p> <p>On successful completion of the unit, Professional Coaches will understand the principles of professional team coaching and will be able to plan, deliver and manage coaching for teams.</p>
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Ofqual unit number A/650/2464

RQF level 5

Guided learning hours 30

Total unit time 100

Credits 10

Aims of unit Team coaching brings together an existing team of people who have shared goals and purpose. This type of coaching can impact on organisational success. It has the power to optimise the effectiveness of a team, promoting trust, collaboration, cohesion and inclusion in the pursuit of a shared goal.

Professional coaching delivered to teams is a strategy increasingly used by organisations to support and develop their staff.

Through the process of working with a Professional Coach, the team and its members are able to benefit from the wisdom and experience of each other.

On successful completion of the unit, Professional Coaches will understand the principles of professional team coaching and will be able to plan, deliver and manage coaching for teams.

Keywords Team, coaching, stakeholders, complexities, challenges, needs, contracting, planning, preparation, delivery, engagement, reflection, excellence.

Terminology The term 'coachee' is used within the qualification to refer to a person receiving coaching. Coaching Providers and Professional Bodies may use different terminology such as 'client'.

The phrase 'coaching assignment' is used to refer to a series of coaching sessions delivered to a Coachee/Coachee's.

Learning outcome 1

Understand the principles of professional team coaching

Assessment criteria

1.1 Define the scope, purpose and benefits of professional team coaching

- 1.2 Analyse stakeholder relationships involved in professional team coaching
- 1.3 Evaluate models and approaches for delivering professional team coaching
- 1.4 Recommend approaches to respond to challenges in the delivery of professional team coaching

Indicative content

1.1 *Scope, purpose and benefits of professional team coaching:*

- *Scope:* Definition of team coaching. Similarities and differences with group coaching, training and facilitation. Strategy to compliment 1:1 coaching, personal and professional development. Organisational culture and objectives.
- *Purpose:* Achievement of organisational/team goals and shared objectives (agreed by the team and informed by sponsor). Response to specific issues, change, development. Build team collaboration and cohesion.
- *Benefits:* Cost benefit. Value added benefits (Phillips and Phillips, 2007). Return on expectation (Kilpatrick and Kilpatrick, 2010). Team cohesion (Britton, 2014. Clutterbuck, 2020. Hawkins, 2021). Decreased absenteeism. Improved retention. Improved motivation. Participation. Productivity. Strategy to react to change (e.g. work, culture). Supports working with others/collaboration (e.g. new recruits, apprentices, future leaders). Promotes inclusion (e.g. individual contribution to team, strategy to support underrepresented groups to progress).

1.2 *Stakeholder relationships involved in professional team coaching:* Professional Coach (internal or external). Teams and individual coachee's. Sponsor. Management team. Interrelationships between stakeholder groups. Role of contracting with stakeholders and with the team (Hay, 2008. Pratt, 2021).

1.3 *Models and approaches for delivering professional team coaching:*

- *Approaches to deliver professional team coaching:* Person Centred coaching (Bryant-Jeffries, 2020). Gestalt Coaching (James, 2021). Solution Focussed Coaching (Passmore, 2021). Performance Coaching (Wilson, 2020). Neurolinguistic Programming in coaching (NLP). Positive Psychology (Vannieuwerburgh and Biswas-Diener, 2020).
- *Coaching models:* GROW model (Whitmore, 2017). OSCAR (Gilbert and Whittleworth, 2009). OSKAR (Jackson and McKergow, 2007). CLEAR model (Hawkins and Smith 2013. Hawkins and McMahon, 2020). T GROW (Downey, 2013). Team Coaching Wheel (Woudstra, 2021).
- *Application of core coaching skills* (e.g. questioning, feedback, use of silence, listening). Flexibility to use tools and techniques relevant to the needs of the team and the individuals being coached.

1.4 *Approaches to respond to challenges in the delivery of professional team coaching:*

- *Challenges in the delivery of team coaching:* Team dynamics. Organisational culture. Personal belief. Personality types. Time commitment (e.g. absenteeism, lateness, work pressures, crises). Individual need versus team needs. Obstruction to coaching by team or individual (e.g. dominant behaviour, passivity, lack of buy in/engagement, failure to show dignity, respect, ethical behaviours, conflict). Group think (e.g. echo chamber, confirmation bias, collusion between group members). Readiness for team or individuals to engage with coaching. Interference from stakeholders (e.g. sponsor/managers/colleagues). Resourcing. Potential conflicts of interest.
- *Approaches to respond to challenges in group and team coaching:* Contracting. Setting/agreeing aims and objectives. Gaining commitment to the process. Coaching approach used. Group or team management. Confidentiality and limitations of confidentiality. Conflict resolution.

Learning outcome 2

Be able to plan and deliver professional team coaching

Assessment criteria

- 2.1 Develop a plan to deliver professional team coaching to meet a specified need
- 2.2 Deliver professional team coaching
- 2.3 Complete records of professional team coaching

Indicative content

2.1 Plan to deliver professional team coaching:

- Develop case for the coaching assignment: Motivation for team coaching (e.g. self-directed or sponsored). Team profile/Person portrait (e.g. individuals, role, organisation).
- Identification of teams needs for coaching (defined or emerging). Prioritisation of outcomes according to coaching need.
- Development of formal written contract for team coaching to include:
 - *Procedural/Administrative*: Logistics, record keeping, engagement with sponsor (reporting requirements), legal frameworks, contract conclusion.
 - *Professional/Roles and responsibilities*: Style of coaching, preferences of team, coaching goals, codes of ethics, behaviour, confidentiality, boundaries, competences, and values, organisational context.
 - *Psychological*: Relationship between team and professional team coach, individuals within team and relationship with sponsor.
- Engagement with stakeholders/sponsor
- Coaching models and approaches to be used in coaching assignment

2.2 Deliver professional team coaching: Coaching to be delivered in line with assessment requirements.

Success indicators: Professional approach to the delivery of coaching: Application of coaching duty. Competency framework (e.g. EMCC UK, ICF UK, AC).

Professional Team Coaches ability to:

- Select and use team coaching models and approaches. Embed principles of diversity and inclusion in team coaching practice.
- Ability to manage team and power dynamics. Establish parameters for coaching, expectations for behaviour, engagement, confidentiality.
- Ambassadorial (e.g. professional appearance and behaviours, being present, confident, self-managing, self-aware).
- Use of emotional intelligence (e.g. empathy, trust, rapport, unconditional positive regard). (Goleman, 2020. Salovey et al, 2004).
- Be spontaneous, open, flexible, resilient, respectful. Ability to respond effectively to changes and challenges which occur during team coaching.

- Communicate effectively: Uses verbal/non-verbal communication. Questioning skills. Listening skills (Covey, 2020). Provides effective feedback. Use of silence. Build and sustain rapport.
- Organisational ability (e.g. time management, scheduling, record keeping).

2.3 *Records of team coaching*: Digital and/or written (e.g. coaching logs/session records). Compliance to organisational and legal requirements (e.g. Data Protection 2018/ UK GDPR). Accuracy and sufficiency of record keeping.

Learning outcome 3

Be able to reflect and act on the outcomes of professional team coaching

Assessment criteria

- 3.1 Reflect on outcomes of professional team coaching to make recommendations for improvement
 3.2 Develop a plan to support the team and individuals beyond the team coaching assignment

Indicative content

3.1 *Reflect on the outcomes of team coaching*: Self-reflection (e.g. knowledge, skills and behaviours against requirements of the professional competency framework (e.g. EMCC UK, ICF UK, AC). Feedback (e.g. team, individuals, observation, coaching supervision, stakeholders/sponsor). Completion of reflective journal. Theories of learning and reflective practice (e.g. Kolb 1984, Gibbs 1988, Schon, 1983). Evaluation of coaching assignment (Starr, 2021). Team outcomes (Clutterbuck, 2020). Outcomes (closure/re-contracting). Exit from coaching.

3.2 *Plan to support the team and individuals beyond the coaching assignment*: Opportunities for re-contracting team coaching. 1:1 coaching. Top up coaching. Recommendations for further training and support. Referral to other support services.

Requirements and Recommendations for assessment

To successfully achieve the requirements of this unit, evidence of team coaching must be proven.

- The Professional Coach must complete ONE (1) coaching assignment with a team. The team should have an objective they would like to achieve. Simulation exercises are not an acceptable form of assessment.
- The coaching assignment must include a minimum of THREE (3) team coaching sessions delivered to a team made up of a minimum of THREE (3) individuals.
- Records of the team coaching assignment must be made (e.g. coaching notes and coaching reflective journal/coaching log).
- The Professional Team Coach must be observed for a minimum of ONE (1) hour when delivering the coaching assignment. The observation may take place in person, virtually, or using an audio or video recording. Feedback on the observation should be provided in written

format (linked to the success indicators for professional coaching). The observer must be a Professional Coach/Coach Supervisor and/or member of a professional coaching body.

Learners may submit evidence of their assessment in several ways. All assessment criteria must be met. The following opportunities are recommendations/requirements for assessment.

1. The learner may be asked to write a **report** or **briefing paper** on the principles of professional team coaching.
2. The learner must submit **work based evidence** accompanied by an index which maps work based evidence to meet each of the assessment criteria.
3. The learner may write a **written account** or **reflective statement** on the outcomes of professional team coaching to identify recommendations for improvements.
4. The learner may develop a **good practice guide** or **planning document** to support the team and individuals beyond the team coaching assignment.

Further guidance

It is not a requirement for the learner to cover all aspects of the indicative content when completing the assessment. The learner is encouraged to select and present well chosen information and examples to evidence they sufficiently understand each of the assessment criteria.

Relationship with CMI Professional Standards: This unit is mapped to:

Personal Effectiveness	<ul style="list-style-type: none"> ● Managing yourself ● Making decisions ● Communicating and influencing
Interpersonal Excellence	<ul style="list-style-type: none"> ● Providing purpose and direction ● Developing people and capabilities ● Building relationships and networks
Organisational Performance	<ul style="list-style-type: none"> ● Leading change and innovation ● Managing resource and risk ● Achieving results

Suggested reading/web resource materials

Recommended Reading

Clutterbuck, D (2020) *Coaching the Team at Work: The definitive guide to team coaching* (2nd Edn) Nicholas Brealey Publishing: London: UK.

Passmore, J (ed) (2021) *The Coaches Handbook: The Complete Practitioner Guide for Professional Coaches*: Routledge: Oxon, England: UK.

Pedrick, C (2021) *Simplifying Coaching, how to have more transformational conversations by doing less*. Open University Press, McGraw Hill. London, England, UK.

Pratt, K. (2021) *Transactional Analysis Coaching: Distinctive Features*: Routledge: London: UK.

Starr, J (2021) *The Coaching Manual, The Definitive Guide to the Process, Principles and Skills of Personal Coaching* (5th edn) Pearson Education Ltd, Harlow, UK.

Woudstra, G (2021) *Mastering the art of team coaching*

Widdowson, L, Barbour, P (2021) *Building top performing teams, A practical guide to team coaching to improve collaboration and drive organisational success*.

Textbooks/eBooks

Boysen-Rotelli, S (2018) *An Introduction to Professional and Executive Coaching*. Information Age Publishing, Charlotte, NC.

Britton, J.J. (2014) *From One to Many: Best Practices for Team and Group Coaching*: Jossey Bass: Ontario: Canada.

Foy, K. (2021) Contracting in Coaching: pp345 – 353 in Passmore, J (ed) (2021) *The Coaches Handbook: The Complete Practitioner Guide for Professional Coaches*: Routledge: Oxon, England: UK.

Goleman, D. (2020) *Emotional Intelligence: Why it Can Matter More Than IQ* (25th Anniversary Edn) Bloomsbury Publishing: London: UK.

Gorell, R (2013) *Group Coaching: A Practical Guide to Optimizing Collective Talent in Any Organization*. Kogan Page: Philadelphia, PA.

Hay, J. (2008) *'Coaching in Practice' Reflective Practice & Supervision for Coaches*: Open University Press, London UK.

Hawkins, P. (2021) *Leadership Team Coaching 'Developing Collective Transformational Leadership'*: Kogan Page, London: UK.

Kirkpatrick, D. & Kirkpatrick, W.K. (2010). *ROE's Rising Star: Why Return on Expectations is getting so much attention*: Training & Development 34 pp 35-38.

Oberstein, S (2020) *10 Steps to Successful Coaching*, 2nd Edition. Association for Talent Development: Alexandria, VA.

Passmore, J., & Turner, E. (2018) *'Reflections on Integrity' – The Appeal Model Coaching at Work*, 13(2) Chapter 31 in Passmore, J (ed) (2021) *The Coaches Handbook: The Complete Practitioner Guide for Professional Coaches*: Routledge: Oxon, England: UK.

Phillips, J. and Phillips, P. (2005) *Measuring ROI in Executive Coaching 'The International Journal of Coaching in Organisations'* pp52 – 62: Issue One.

Phillips, J. and Phillips, P. (2007) *Show Me the Money: How to Determine ROI in People, Projects & Programs*: Berrett-Koehler. San Francisco: CA, USA.

Rogers, J., Whittleworth, K., & Gilbert, A. (2012) *Manager as Coach: The New Way to Get Results*: McGraw Hill: England: UK.

Wilson, C. (2020) *Performance Coaching: 'A Complete Guide to Best Practice Coaching & Training* (3rd Edn): Kogan Page: London: UK

Web-links

The PLUS Decision Making Model @

http://www.burtbertram.com/teaching/ethics/Article_02-PLUS_DecisionMakingModel.pdf

Coaching Associations Coach Competences & Global Code of Ethics

Association of Coaching (AC) Core Coach Competences at:

https://c.ymcdn.com/sites/www.associationforcoaching.com/resource/resmgr/Accreditation/Accred_General/Coaching_Competency_Framework.pdf

EMCC UK European Mentoring and Coaching Council <https://emccuk.org/>

International Coach Federation (ICF) Coach Core Competences at:

<https://coachfederation.org/core-competencies>

Global Code of Ethics @ <https://www.globalcodeofethics.org>

ManagementDirect resources require CMI membership and a username and password.

Please note: This list is provided to guide the learner to potential sources of information and is by no means exhaustive. The websites, books and journals cited were correct at the date of publication. All references to legislation stated within the unit may be subject to subsequent changes, deletions and replacements. Learners may make reference to other local or national legislation as relevant.

COMMAND VERB - DEFINITIONS

Command Verb	Definition
Analyse	Break the subject or complex situation(s) into separate parts and examine each part in detail; identify the main issues and show how the main ideas are related to practice and why they are important. Reference to current research or theory may support the analysis.
Appraise	Assess, estimate the worth, value, quality, performance. Consider carefully to form an opinion.
Articulate	Express or clearly state your understanding of the topic.
Assess	Provide a reasoned judgement or rationale of the standard, quality, value or importance of something, informed by relevant facts/rationale.
Comment	Identify and write about the main issues, express an opinion, giving reaction to what has been read/observed.
Compare	Review the subject(s) in detail – looking at similarities and differences.
Conceptualise	Create a diagram, model, chart or graphic with annotations, providing a holistic overview of the process.
Conduct	Organise and perform a particular activity
Consider	Take (something) into account (i.e. different ideas, perspectives, theories, evidence) when making a judgement
Construct	To create or build something original
Create	Originate or produce a solution to a problem.
Critically Evaluate	Consider the strengths and weaknesses, arguments for and against and/or similarities and differences. The writer should then judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Apply current research or theories to support the evaluation when applicable. Critical evaluation not only considers the evidence above but also the strength of the evidence based on the validity of the method of evidence compilation.
Critically	Typically used to qualify verbs such as evaluate, assess, appraise, analyse and reflect. Give in-depth insight, opinion, debate, verdict based on a wide variety of sources, theory, research which may agree and contradict an argument.
Critique	A detailed analysis and assessment of something, especially a literary, philosophical, or political theory.
Define	Show or state clearly and accurately.
Describe	Provide an extended range of detailed factual information about the topic or item in a logical way.
Determine	Settle/conclude an argument/question as a result of investigation or by referring to an authority.

Develop	Elaborate, expand or progress an idea from a starting point building upon given information.
Differentiate	Recognise or ascertain a difference to identify what makes something different.
Discuss	Give a detailed account including a range of views or opinions, which include contrasting perspectives.
Distinguish	Draw or make distinction between
Draw	Present a conclusion or decision about what is likely to happen based on facts.
Establish	Discover, prove or show something to be true or valid by determining the facts.
Evaluate	Consider the strengths and weaknesses, arguments for and against and/or similarities and differences. The writer should then judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Apply current research or theories to support the evaluation when applicable.
Examine	Inspect (something) thoroughly in order to determine its nature or condition.
Explain	Make something clear to someone by describing or revealing relevant information in more detail.
Formulate	To devise or develop an idea or concept in a concise and systematic way.
Identify	Ascertain the origin, nature or definitive characteristics of something.
Interpet	To clarify/explain the meaning of something
Investigate	Carry out a systematic or formal inquiry to discover and examine the facts of (problem, options, incident, allegation etc) so as to establish the truth.
Justify	Provide a rationale for actions and/or decisions. Your rationale should be underpinned by research, academic theory, data analysis or experience.
Outline	A general description/broad account/summary of something showing essential features/outline the case briefly but not the detail.
Prepare	To make or develop something ready which will happen in the future.
Produce	To make, create or form something. Put together, assemble. leads to an outcome/result.
Recommend	Put forward proposals, an alternative or suggestion(s) supported by a clear rationale appropriate to the situation/context.
Reflect	Consciously contemplate, appraise or give balanced consideration to an action or issue.
Report	A structured document communicated or presented in an oral or written form and organised in a narrative, graphic or tabular form referring to a specific period, event or topic area.
Research	A detailed study or investigation of a subject in order to establish facts and reach new conclusions.
Review	To examine, survey, reconsider a subject, theory or item.
Specify	Identify or state a fact or requirement clearly and precisely in detail.

Summarise	Sum up or give a brief account of relevant information in your own words.
Use	The action of using something for a particular purpose.

ASSESSMENT ACTIVITY - DEFINITIONS

Activity Definition	Activity Definition
Briefing paper	A summary of facts pertaining to a particular issue or problem. Often includes a suggested course of action.
Business case	A formal document, presented in an oral or written format, which provides justification for an idea or project to address an identified business need or challenge.
Case Study	A description of an event, activity or problem outlining a real or hypothetical situation.
Good practice guide	A structured document produced with the purpose of supporting individuals to develop their practice in a particular area.
Plan	A detailed outline providing an insight into a range of activities required to complete a task.
Profile	An outline giving a description of a role or organisation
Proposal	A formal document, presented in an oral or written format, which puts forward ideas or suggestions for consideration by others.
Reflective Statement	Learners describe their actions in particular situations and reflect on the reasons for practicing in that way. This is particularly useful to provide evidence that they can evaluate their knowledge and practice.
Report	A structured document communicated or presented in an oral or written form and organised in a narrative, graphic or tabular form referring to a specific period, event or topic area.
Research project report	A formal, written document, organised in a narrative, graphic or tabular form presenting findings and recommendations.
Scenario	A written outline or a situation or setting, providing insight into a sequence of events or actions.
Written account	A written document presenting knowledge of facts or event
Work Based Evidence	An activity from within the workplace that is used by the learner to evidence and/or demonstrate competence and understanding

RESOURCES TO ASSIST WITH UNIT COMPLETION

In order to support learners with their assessment, CMI has created additional resources designed to meet the needs of the following Unit 536.

Please note: these documents are not compulsory; it is strongly recommended that learners use these in conjunction with the CMI-designed assessment briefs or a version similar to these, to ensure all criteria are met.

Unit 536 Professional Team Coaching

Workbased Evidence Mapping

Professional Team Coaching Assignment Plan

Observation Report

Record of Professional Team Coaching

Professional Team Coaching Reflective Statement

PROFESSIONAL TEAM COACHING ASSIGNMENT PLAN

UNIT 536 PROFESSIONAL TEAM COACHING

Please complete the form for the planned team coaching assignment.

Professional Team Coach		
Team Coachee Names/References	1	
	2	
	3	
Date		

Case for Team Coaching Assignment	
Motivation for team coaching (e.g. self-directed, sponsored).	
Team Profile/Person Portrait (e.g. individuals, role, organisation).	
Identification of Teams needs for coaching (defined or emerging). Prioritisation of outcomes according to coaching need. <i>Please note: Please add/list attachments below if used.</i>	
Engagement with stakeholders/sponsor (if appropriate)	
Coaching approach, models, tools and techniques to be used in team coaching assignment	

Attachments: Please complete the list of attachments which support the coaching assignment.

Please note: A formal written coaching contract must be attached.

1: Formal written coaching contract (e.g. procedural/administrative, professional/roles and responsibilities, psychological contract)
2:
3:

Professional Coach	Signature:	Date:
Team Coachee: I agree for my records to be used for the purpose of assessment	Signature:	Date:
	Signature:	Date:
	Signature:	Date:

RECORD OF PROFESSIONAL TEAM COACHING

UNIT 536 PROFESSIONAL TEAM COACHING

Please complete a record of professional team coaching for each session of the coaching assignment.

Professional Team Coach	
Team Coaches Name/Reference	
Date	
Venue	

Record of Professional Team Coaching

Professional Team Coach	Signature:	Date:
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PROFESSIONAL TEAM COACHING OBSERVATION REPORT

UNIT 536 PROFESSIONAL TEAM COACHING

Professional Team Coach	
Observer	
Team/Coachee's	
Date of Observation	
Context of Team Coaching Assignment	

Success Indicators: Professional Team Coaches ability to:	
Select and use team coaching models and approaches.	
Embed principles of diversity and inclusion in team coaching practice.	
Establish parameters for coaching, expectations for behaviour, engagement, confidentiality.	
Be an ambassadorial for the coaching profession (e.g. professional appearance and behaviours, being present, confident, self-managing, self-aware).	
Use emotional intelligence (e.g. empathy, trust, rapport, unconditional positive regard).	
Be spontaneous, open, flexible, resilient, respectful.	
Respond effectively to changes and challenges which occur during team coaching. Manage team and power dynamics.	
Communicate effectively: Use verbal/non-verbal communication. Questioning skills. Listening skills. Provides effective feedback. Use of silence. Builds and sustains rapport.	
Organise professional team coaching (e.g. time management, scheduling, record keeping).	
Application of coaching duty. Competency framework (e.g. EMCC UK, ICF UK, AC).	

Observer feedback: Areas of good practice/Opportunities for improvement:
Signature and date:
Professional Status:

**PROFESSIONAL TEAM COACHING REFLECTIVE STATEMENT
(LOG/JOURNAL)
UNIT 536 PROFESSIONAL TEAM COACHING**

Please complete a reflective log/journal, you may amend this box to meet your requirements.

Professional Team Coach	
Date	

Professional Team Coach	Signature:	Date:
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APPENDIX 1 - REVISIONS TO DOCUMENT

The below table summarises any revisions made to this document since publication.

Revisions to Document	Rational for Revision	Document Version	Date Revisions Made
First Publication		Version 1	June 2022
Updated word count for unit 536, now 3500	Update word count to be consistent across documentation	Version 2	June 2023