LEVEL 5 PRINCIPLES OF PROFESSIONAL COACHING

Syllabus | June 2022 | Version 1

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QUALIFICATION OBJECTIVE

These qualifications are designed to support individuals in the development of knowledge of professional coaching, helping them understand the core requirements for effective coaching practice.

These qualifications are designed for individuals wishing to develop their knowledge of professional coaching in order to understand the coaching process, without the requirement to demonstrate the application of skills.

The qualifications have been designed for practising or aspiring Professional Coaches wishing to formalise or develop their learning and progress on to a coaching role.

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

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
5A37	CMI Level 5 Award in Principles of Professional Coaching	610/0901/5
5C37	CMI Level 5 Certificate in Principles of Professional Coaching	610/0902/7

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 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

These qualifications can be offered to Learners from age 19. CMI does not specify entry requirements for these qualifications, 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.

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 PRINCIPLES OF PROFESSIONAL COACHING
Learners must select at least one unit to a minimum of 60 TUT hours, 6 credits to achieve this qualification.
The minimum GLH is 14 hours.

CMI LEVEL 5 CERTIFICATE IN PRINCIPLES OF PROFESSIONAL COACHING
Learners must select at least two units to a minimum of 140 TUT hours, 14 credits to achieve this qualification.
The minimum GLH is 34 hours.

Unit Code	Unit Title	GLH	TUT	Credits
531	Principles of Professional Coaching	16	60	6
532	The Role of the Professional Coach	28	90	9
533	Strategies for Delivering Professional Coaching	16	70	7

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.

ASSESSMENT & VERIFICATION

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 CMI Centre Handbook for more information.

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
531	Principles of Professional Coaching	X		X		
532	The Role of the Professional Coach	X				
533	Strategies for Delivering Professional Coaching	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
531	Principles of Professional Coaching	4000
532	The Role of the Professional Coach	4000
533	Strategies for Delivering Professional Coaching	4500

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:

531 Principles of Professional Coaching	Coaching is a transformative learning process which can enable individuals to achieve their full potential. This unit introduces the principles of professional coaching, including the similarities and differences with other methods of support and the rationale for its delivery. There is a focus on the roles and responsibilities within the coaching relationship, organisational, legal and ethical frameworks and quality assurance. On successful completion of the unit, the Professional Coach will be equipped with an understanding of the processes for contracting, delivering, and managing coaching.
532 The Role of the Professional Coach	The ability to deliver high quality coaching is central to the role of the Professional Coach, regardless of whether they coach within their own organisation or as an external contractor. This unit focuses on the knowledge, skills, and behaviours required to coach in a manner that is engaging, builds trust, and supports the coachee to progress towards their goals. The unit is designed to enable the Professional Coach to explore strategies for managing stakeholder relationships, communicating with impact, problem solving and decision making. It concludes by considering how the Professional Coach can be supported to optimise the effectiveness of their practice.

533 Strategies for Delivering Professional Coaching	The Professional Coach must utilise their knowledge, skills and expertise when selecting and using strategies for the delivery of professional coaching. Choosing the best approach can be challenging. This unit introduces a wide range of strategies for delivering professional coaching. It also explores the influence of coachee's values, behaviours and culture on their ability to engage with the coaching process.
	On successful completion of the unit, the Professional Coach will be able to apply their understanding of approaches, models, tools and techniques to develop a strategy to respond to different needs and expectations of coachee's.

Ofqual unit number	J/650/2459
RQF level	5
Guided learning hours	16
Total unit time	60
Credits	6

Aims of unit

Coaching is a transformative learning process which can enable individuals to achieve their full potential. This unit introduces the principles of professional coaching, including the similarities and differences with other methods of support and the rationale for its delivery. There is a focus on the roles and responsibilities within the coaching relationship, organisational, legal and ethical frameworks and quality assurance.

On successful completion of the unit, the Professional Coach will be equipped with an understanding of the processes for contracting, delivering, and managing coaching.

Keywords

Principles, roles, responsibilities, ethics, legal, contracting, delivery, support, supervision, 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 the coachee.

Learning outcome 1
Understand the principles of professional coaching
Assessment criteria
1.1 Discuss the benefits of professional coaching 1.2 Evaluate professional coaching with other methods that support the development of individuals 1.3 Analyse the roles and responsibilities for delivering and managing professional coaching 1.4 Evaluate the ethical and legal frameworks which inform professional coaching

Indicative content

1.1 Professional coaching: Definitions and descriptions of professional coaching (e.g. Clutterbuck (2020), Hawkins (2021), Rogers (2012), Starr (2021), Wilson (2020)).

1.1 Benefits of professional coaching:

- *Benefits to coachee:* Development of knowledge, skills, behaviours. Personal growth. One to one support (informal or formal coaching).
- *Benefits to teams or groups through coaching:* Development of capability to achieve shared goals/aspirations. Team cohesion (Britton, 2014; Clutterbuck, 2020; Hawkins, 2021).
- *Benefits to the organisation:* Supports organisational strategy, culture and values. Development of leadership capability, talent development, cultural change. Development of capability to achieve shared goals/aspirations. Development of good/best practice. Delivery of Value (e.g. Return on Investment (Phillips & Phillips, 2005, 2007) Return on Expectation (Kirkpatrick and Kirkpatrick, 2010)).
- *Versatility:* One to one coaching, group coaching, team coaching. Face to face, virtual or hybrid coaching.

1.2 *Methods to support the development of individuals (similarities and differences):* Mentoring, training, counselling, performance management and consulting.

1.3 Roles and responsibilities (including inter-relationships between roles/potential conflicts of interest):

- *Professional Coach***:** Coaching is the professional's primary occupation (employed or contracted). Specialism (e.g. Business Coach. Career Coach. Performance/Skills Coach. Executive Coach. Wellbeing Coach. Work Coach).
- *Internal coach:* Delivers coaching in addition to their primary role. May not manage or lead others. They may be part of an internal coaching group or pool of coaches*.*
- *Leader as Coach:* Delivers coaching as part of their leadership role. Applies coaching skills in their leadership approach.
- *Coachee:* Client. Person receiving coaching. Self-referral (self-funded) or sponsored (funded by organisation/sponsor).
- *Sponsor/Stakeholder:* Finances/resources and/or supports coaching and coachee.
- *Coach Supervisor:* Qualified in coach supervision. Responsible for quality, development, resourcing. Methods of supervision used (e.g. individual, group and/or peer supervision).

1.4 *Ethical frameworks:* Codes of ethics (including codes of conduct/competences/values) approved by professional bodies (e.g. EMCC UK, ICF UK, AC). Ethical decision-making models (e.g. APPEAR (Passmore and Turner, 2018) PLUS (Ethics Resource Centre)). Confidentiality within the coaching relationship (e.g. Boundaries of role. Limitations of confidentiality. Disclosure. Management of digital and written coaching records). Role of coaching contracts.

*Organisational and legal frameworks***:** Data Protection Act/GDPR UK (2018). Equality Act (2010). Prevent Strategy (2015). Safeguarding. Organisational policies and procedures. Organisational values. Good practice requirement for Professional Coaches to have insurance for the work they conduct (e.g. Professional indemnity insurance).

Learning outcome 2

Understand the process for contracting and delivering professional coaching

Assessment criteria

2.1 Evaluate the role and purpose of contracting in professional coaching

2.2 Discuss the process for delivering professional coaching

Indicative content

2.1 *The role and purpose of contracting* (Hay, 2008. Pratt, 2021)*:*

- *Procedural/Administrative:* Logistics, record keeping, engagement with sponsor (reporting requirements), legal frameworks, contract conclusion.
- *Professional/Roles and responsibilities:* Style of coaching, preferences of coachee, coaching goals, codes of ethics, confidentiality, boundaries, competences and values, organisational context.
- *Psychological:* Relationship between coachee and coach, expectations, exit strategy.

Coaching contract: Formal, informal, written, verbal. Types of contracting (e.g. One to One, One to Team/Group. Multi stakeholder contracting (coach, coachee/s, sponsor etc). Contracting at different stages of coaching (e.g. overall coaching agreement, session contract, closure contract). Contracting models (e.g. ABC of contracting, PROMISES, STOKERS and DOUSE (Foy, 2020)).

2.2 Process (stages) for delivering professional coaching:

- First conversation (e.g. introductory meeting/chemistry/alchemy meeting).
- Identification of coachee needs (e.g. coaching needs analysis. Use of techniques to identify coachee/s outcomes).
- Collaborative agreement of coaching outcomes (Defined or emerging). Prioritise outcomes according to coaching need.
- Contractual agreement (frequency, timing, records, review, confidentiality and limitations of confidentiality).
- Engagement of stakeholder/sponsor.
- Planning and preparation for coaching (e.g. Strategy for coaching - coaching approach, models, tools and techniques).
- Delivery of coaching assignment (Progress review. Value of coaching for coachee and stakeholders).
- Evaluation of coaching assignment (e.g. Starr, 2021. Hawkins and Turner, 2021). Outcomes (closure/re-contracting). Exit from coaching.

Recommendations for assessment

Learners may approach the assessment in a number of ways. All assessment criteria must be met. The following opportunities are recommendations for guidance purposes only.

1. The learner may be asked to write a **written account** or **briefing paper** for people entering the profession on the principles of professional coaching.

2. The learner may be asked to develop a **written account** or **report** on the process for contracting and delivering professional coaching.

3. The learner may present **work based evidence** accompanied by written reports and an index to show how the evidence maps to each assessment criteria in the unit.

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	● Managing yourself ● Making decisions ● Communicating and influencing
Interpersonal Excellence	● Providing purpose and direction ● Developing people and capabilities ● Building relationships and networks
Organisational Performance	● Leading change and innovation ● Managing resource and risk ● Achieving results

Mapping for Coaching Professional Apprenticeship Standard ST0809 AP01	
KSB	**Descriptor**
K4	The importance of coaching contracting and re-contracting, and models enabling its effectiveness.
K6	Coaching protocols/Codes of conduct
K9	Theories of return on investment and delivery of value
K10	Differences and similarities between coaching, mentoring, training, counselling, performance management and consulting
K11	Relevant legislation (Data Protection, Safeguarding) Coaching competencies and codes of ethics described by the main professional bodies
S4	Confidentiality (including when maintaining coaching records) and management of boundaries (including their own competence and values, relevant codes of ethics, and relevant legislation, policies and procedures)

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) T*ransactional 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.

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: pp 345 – 353 in Passmore, J (ed) (2021) *The Coaches Handbook: The Complete Practitioner Guide for Professional Coache*s: Routledge, Oxon, England, UK.

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.

Hawkins, P., & Turner, (2020) *Systemic Coaching: Delivering Value Beyond the Individual*: Routledge: 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 Edn): Association for Talent Development, Alexandria, VA.

Passmore, J., & Turner, E. (2018) '*Reflections on Integrity' – The Appear 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_Framewor.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.

Ofqual unit number	M/650/2460
RQF level	5
Guided learning hours	28
Total unit time	90
Credits	9
Aims of unit	The ability to deliver high quality coaching is central to the role of the Professional Coach, regardless of whether they coach within their own organisation or as an external contractor. This unit focuses on the knowledge, skills, and behaviours required to coach in a manner that is engaging, builds trust, and supports the coachee to progress towards their goals.
	The unit is designed to enable the Professional Coach to explore strategies for managing stakeholder relationships, communicating with impact, problem solving and decision making. It concludes by considering how the Professional Coach can be supported to optimise the effectiveness of their practice.
Keywords	Coaching, knowledge, skills, behaviours, communication, relationships, stakeholders, barriers, challenges, CPD, 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 knowledge, skills and behaviours for delivering professional coaching
Assessment criteria
1.1 Analyse the knowledge, skills, and behaviours for delivering effective professional coaching   1.2 Evaluate communication techniques for developing relationships in professional coaching
Indicative content

1.1 Knowledge*: Understanding of coaching approaches, models, tools, and techniques. Organisational and legal frameworks (e.g. Safeguarding, Data Protection, Confidentiality). Codes of ethics (e.g. EMCC UK, ICF UK, AC). Contracting. Stakeholder management.

Skills*: Ability to articulate the coaching process and its benefits. Communicate the roles and responsibilities of the coach, coachee, sponsor/stakeholders etc. Explore challenging subject areas (e.g. emotional state, characteristics of wider system (e.g. own organisation, community, environment)). Manage interrelationships between coachee's and stakeholders. Manage responsibilities of coaching within your own work role as appropriate. Organisational ability (e.g. time management, scheduling, record keeping).

Behaviours*: Act as an ambassador for a coaching mindset. Positive approach to personal development. Self-aware (e.g. own behaviours, values, beliefs, and attitudes). Mindful of own well-being (e.g. mental capacity). Embeds principles of diversity and inclusion in coaching practice. Spontaneous, open, flexible, resilient, respectful, engenders trust. Self-leadership (e.g. management of self, managing and setting priorities).

* To include reference to professional body competency framework (e.g. EMCC UK, ICF UK, AC). Influence and/or impact of values and beliefs on knowledge, skills and behaviours.

*1.2 Communication techniques***:** Verbal/non-verbal communication. Questioning (e.g. question types such as open, closed, reflective, exploratory). The style of questioning (e.g. cathartic, catalytic (Heron, 1989)). Use of effective feedback (e.g. challenging to explore limiting assumptions/negative beliefs. Supportive feedback). Ability to deliver feedback in a style that is acceptable, non-judgemental, and meaningful to coachee's (Blakey and Day, 2012). Listening skills and levels of listening (Covey, 2020). Transactional Analysis (Pratt, 2021). Matching and mirroring. Use of silence (Turner, 2020). Core competencies for communicating effectively in coaching (e.g. EMCC UK, ICF UK, AC).

Learning outcome 2
Understand how to manage the coaching relationship
Assessment criteria
2.1 Assess approaches for developing and maintaining relationships with coachee's 2.2 Evaluate approaches for managing stakeholder relationships 2.3 Recommend strategies to respond to challenges that impact on coaching relationships
Indicative content
2.1 Approaches for developing and maintaining relationships: Emotional intelligence (Goleman, 2020). Use of empathy, trust, rapport, unconditional positive regard (Rogers C, 1965)). Honesty. Recognition of difference and similarities between own personal values and those of the coachee. Ability to identify and respond to enabling or limiting beliefs, negative or positive patterns of thinking and behaviours (e.g. energy shifts). Adapts coaching style (e.g. use of language and behaviour to

meet the need of coachee). Reacts effectively to successes, challenges or issues that arise in the coaching relationship. Validates coachee's understanding of themselves and their circumstances.

2.2 Stakeholder relationships: Identify key stakeholders/sponsor (e.g. seniority of stakeholder/power dynamic). Stakeholder management. Identification of stakeholder requirements (agenda/expectations/outcomes). Stakeholder mapping model (Johnson et al, 2005 adapted from Mendelow,1982).

2.3 Challenges:

● *Coach and coachee relationship:* Readiness and willingness for coaching/coachability, (Clutterbuck, 2020). Lack of understanding and/or commitment to the process (coach and coachee). Failure to engage (e.g. non-attendance, lateness). Coachee emotions (e.g. crying, anger, passivism). Personal differences (e.g. culture, values, beliefs). Boundary issues (e.g. over familiarity, dependency). Transference and countertransference. Resistance to change. Ethical issues (e.g. disclosure regarding own or colleagues' behaviour). Appropriateness of coaching (e.g. suitability of method versus training, mentoring, counselling).

● *Stakeholder relationship:* Stakeholder management. Manager's influence, understanding and expectations of coaching (e.g. delivery and outcomes). Devolving/abdicating responsibility for managing coachee. Mismatch between coachee needs and stakeholder requirements.

● *Organisational/Operational:* Organisational top-level support. Culture and governance. Resourcing (e.g. funding, time, place for coaching). Theory of organisational culture and values. Leadership styles and the impact on individuals and their behaviour.

Strategies: Practical application of knowledge, skills and behaviours. Communication techniques. Contracting.

Learning outcome 3
Understand how Professional Coaches can be supported in their coaching role
Assessment criteria
3.1 Justify the reasons for maintaining a record of continual professional development (CPD)   3.2 Analyse the role of reflective practice in professional coaching   3.3 Evaluate the role and purpose of coach supervision for Professional Coaches
Indicative content
3.1 Reasons for continual professional development (CPD): Optimising coaching capability and practice. Maximise outcomes for coachee's and sponsors. Maintain up to date coaching practice (e.g. ability to use tools, techniques, technology). Developing evidence to gain accreditation with membership organisations (e.g. EMCC UK, ICF UK, AC).   *Continual professional development (CPD):* Training, webinars, attendance of CPD events, co-coaching groups/forums, book reviews, observation, coach supervision. Seminars delivered by coaching organisations.   *3.2 Reflective practice:* Reflection on coaching capability (e.g. feedback from coachee's, coaching supervisor, peers, stakeholders). Reflection on coaching approach, challenges, successes, and

opportunities for improvement. Theories of learning and reflective practice (e.g. Borton 1970. Kolb 1984. Gibbs 1988. Schon, 1983). Neuroscience 'NLP' psychology and neuroscience, including linguistic interpretation and application (Riddell, 2021).

3.3 Role and purpose of coach supervision: Qualitative, Developmental, Resourcing (Hawkins et al, 2019). Provides a safe reflective space for learning, development of knowledge, behaviours and skills. Personal growth.

Types of supervision: Group supervision. One-to-One supervision. Peer supervision. Self-supervision. Observation and feedback on practice. Use of Action Learning Sets.

Recommendations for assessment

Learners may approach the assessment in a number of ways. All assessment criteria must be met. The following opportunities are recommendations for guidance purposes only.

1. The learner may be asked to write a **written account** on the knowledge skills and behaviours for delivering professional coaching.

2. The learner may be asked to write a **report** or **proposal document** on managing the coaching relationship

3. The learner may be asked to write a **written account** or **briefing paper** on the support for Professional Coaches in their coaching role.

4. The learner may present **work based evidence** accompanied by written reports and an index to show how the evidence maps to each assessment criteria in the unit.

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	● Managing yourself ● Making decisions ● Communicating and influencing
Interpersonal Excellence	● Providing purpose and direction ● Developing people and capabilities ● Building relationships and networks
Organisational Performance	● Leading change and innovation ● Managing resource and risk ● Achieving result

Mapping for Coaching Professional Apprenticeship Standard ST0809 AP01	
KSB	**Descriptor**
K1	Theories of learning and reflective practice such as Kolb, Gibbs, Schon, etc and basic schools of psychology and neuroscience, including linguistic interpretation and application.
K5	The theory of organisational culture (and values) and leadership styles and the impact these can have on individuals and their behaviour.
K7	Methods of communication including verbal/non-verbal/building rapport/matching and mirroring. Listening skills, including levels of listening. Theories of relationship management, including transactional analysis, power dynamics, and stakeholder management theories.
S1	Self-management: Time management, including scheduling coaching sessions, and self-leadership to resolve conflicting priorities and ensure sufficient time for record keeping and other role activities.
S2	Working with those receiving coaching to set clear goals. Including visualisation techniques, setting timescales, validating their achievability, recording outcome-focussed, prioritised action plans and monitoring progress towards goals.
S3	Communication, including (but not limited to) descriptions of the coaching process and roles and responsibilities (including those related to boundaries and confidentiality), and the benefits of coaching in relation to the context of those receiving coaching.
S5	Stakeholder management, including a range of challenging and senior people, and focus on their agenda and outcomes throughout.
S6	Rapport/trust building and maintenance, including recognition of the personal values, emotional state(s) and response of those receiving coaching, validating their understanding of themselves and their circumstances, dealing with difficult coaching relationships and ensuring non-dependence on the coach.
S7	Deliver feedback in a style that is useful, acceptable, non-judgemental and meaningful to those receiving coaching.
S8	Identification of patterns of thinking and limiting/enabling beliefs and actions.
S9	Questioning techniques to raise the self-awareness of those receiving coaching, including asking open questions, broaching challenging subject areas (e.g. emotional state, characteristics of wider systems) and questioning untrue, limiting assumptions.
S11	Demonstrates emotional intelligence, including demonstrating empathy and genuine support for those receiving coaching ("Unconditional positive regard"), and adapting language and behaviour in response to the whole person of those receiving coaching.
S13	Identifies energy shifts within a coaching context, enabling those to be aired and addressed and managed.
S14	Manages and celebrates diversity in their coaching practice, including demonstrating how diversity and inclusion informs their professional practice.
S15	Demonstrates awareness of own values, beliefs, and behaviours; recognises how these affect their practice and uses this self-awareness to manage their effectiveness in meeting the objectives of those receiving coaching and, where relevant, the sponsor.

B1	Committed to self-development, including self-reflection, gathering information on the effectiveness of their own practice, producing personal development plans and receiving coach supervision.
B2	Self-awareness, including of their own behaviours, values, beliefs and attitudes, and attending to their own well-being, resilience and maintaining mental capacity.
B3	Act as an ambassador for a coaching mindset and positive approach to personal development.
B4	Is spontaneous, open and flexible, demonstrating respect and engendering trust.

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) T*ransactional 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.

Textbooks/eBooks

Birch, J., & Welch, P. (2019) (Eds) *Coaching Supervision: Advancing Practice, Changing Landscapes*: Routledge: Oxon: UK.

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: pp 345 – 353 in Passmore, J (ed) (2021) *The Coaches Handbook: The Complete Practitioner Guide for Professional Coache*s: Routledge, Oxon, England, UK.

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

Hawkins, P., & Turner, (2020) Systemic Coaching: *Delivering Value Beyond the Individual*: Routledge: London: UK.

Heron J. (1989) Six-Category Intervention Analysis, (3rd edn). *Human Potential Resource Group*, University of Surrey, Surrey, UK.

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

Hawkins, P, Turner, E & Passmore, J (2019) *The Manifesto for Supervision*. Henley-on-Thames: Association for Coaching and Henley Business School. ISBN: 978-1-912473-24.

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

Lucas, M. (2020) (Ed) *101 Coaching Supervision Techniques, Approaches, Enquiries and Experiment*s: Routledge : London, UK.

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

Passmore, J., & Turner, E. (2018) '*Reflections on Integrity' – The Appear 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.

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_Framewor.pdf

International Coach Federation (ICF) Coach Core Competences at:
https://coachfederation.org/core-competencies

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

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.

Unit 533	Strategies for Delivering Professional Coaching

Ofqual unit number	R/650/4261
RQF level	5
Guided learning hours	16
Total unit time	70
Credits	7
Aims of unit	The Professional Coach must utilise their knowledge, skills and expertise when selecting and using strategies for the delivery of professional coaching. Choosing the best approach can be challenging. This unit introduces a wide range of strategies for delivering professional coaching. It also explores the influence of coachee's values, behaviours and culture on their ability to engage with the coaching process.

On successful completion of the unit, the Professional Coach will be able to apply their understanding of approaches, models, tools and techniques to develop a strategy to respond to different needs and expectations of coachee's. |
| **Keywords** | Coaching approaches, models, tools and techniques, strategies, performance, capability, capacity, talent, 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 the coachee/coachee's. |

Learning outcome 1
Understand strategies for delivering professional coaching
Assessment criteria
1.1 Evaluate approaches for delivering professional coaching 1.2 Review models for delivering professional coaching 1.3 Analyse tools and techniques for delivering professional coaching

Indicative content

1.1 Approaches to delivering professional coaching: Cognitive Behavioural Coaching (Wilson, 2020). Person Centred coaching (Bryant-Jeffries, 2020). Gestalt Coaching (James, 2021). Solution Focussed Coaching (Passmore, 2021). Narrative Coaching (Drake, 2020). Performance Coaching (Wilson, 2020). Neurolinguistic Programming in coaching (NLP). Neuroscience Coaching (Riddell, 2020). Positive Psychology (Vannieuwerburgh and Biswas-Diener, 2020). Integrated approach to coaching / mixed method approach (Passmore, 2020).

1.2 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).

1.3 *Tools and techniques for professional coaching:* Goal setting (e.g. SMART). Alignment of personal and organisational goals, and aspiration/dream goals. Action planning. Visualisation. SWOT analysis. Kline's Thinking Environment (1999). Use of Metaphor. Diagnostic tools to explore personality types theories such as preferences for introversion vs extroversion, integrity, human values and how they impact on behaviour and organisations (e.g. MBTI, 360-degree feedback, Facet 5, Insights Discovery). Motivational Maps (e.g. motivational theories. Herzberg). NLP techniques. Communication techniques (e.g. listening, questioning, use of silence). Johari Window (Luft and Ingram, 1955). Journey from unconscious incompetence to unconscious competence.

Learning outcome 2

Be able to recommend strategies for delivering professional coaching

Assessment criteria

2.1 Evaluate factors which impact on the delivery of professional coaching

2.2 Recommend strategies for delivering professional coaching to respond to coachee's needs.

Indicative content

2.1 Factors: Transcultural issues (e.g. cultural awareness, diversity and inclusion, bias theory, emotional intelligence (e.g. Goleman, 2020. Salovey et al, 2004). Differences of self or others, mindset, emotions, motivations (Hawkins and McMahon, 2020)). Mental health and well-being (e.g. disclosure, limitations of confidentiality. Stress, anxiety, depression). Physical health needs. Coachability/mindset for coaching (e.g. knowledge, understanding and reasons for coaching. Preparedness to engage/participate. Self-awareness, openness, growth mindset, vulnerability, and support (Hawkins 2021)). Maslow's Hierarchy of Need.

2.2 Strategies: For the delivery of coaching to a coachee on a one-to-one basis. Strategy to include:

- Approach for delivering coaching
- Selected coaching model/models
- Selected tools, and techniques

The strategy for delivering professional coaching considers health and well-being of the coachee, coachability, equality, diversity and inclusion.

Coachee need within an organisational context: Improve performance, capability, capacity. Personal and professional development. Talent development. Change management. Change of career. Transition of role (career advancement or role change/ new to role). Return/transition back to work. Development of leadership skills. Working with others.

Recommendations for assessment

Learners may approach the assessment in a number of ways. All assessment criteria must be met. The following opportunities are recommendations for guidance purposes only.

1. The learner may be asked to write a **written account** or **briefing paper** on approaches, models, tools and techniques for delivering professional coaching.

2. The learner may be asked to write a r**eport** or **good practice guide** where they evaluate factors which impact on the delivery of professional coaching

3. The learner may be asked to write a r**eport** or **good practice guide** in which they recommend strategies to deliver coaching to TWO (2) coachee's in an organisational context.

4. The learner may present **work based evidence** accompanied by written reports and an index to show how the evidence maps to each assessment criteria in the unit.

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.

This unit has been designed to prepare apprenticeship candidates for the knowledge test.

Relationship with CMI Professional Standards: This unit is mapped to:	
Personal Effectiveness	- Managing yourself - Making decisions - Communicating and influencing
Interpersonal Excellence	- Providing purpose and direction - Developing people and capabilities - Building relationships and networks
Organisational Performance	- Leading change and innovation - Managing resource and risk - Achieving results

Mapping for Coaching Professional Apprenticeship Standard ST0809 AP01	
KSB	**Descriptor**
K2	The theories of emotional and social intelligence, such as Goleman and Salovely & Mayer, and application of the theories to understanding self.
K3	Diversity and inclusion and bias theory, including personality types theories, such as preferences for introversion vs extroversion, integrity, ontology and human values and how they impact on behaviour and organisations. The theory of self-actualisation, such as Maslow's Hierarchy of Need, motivational theory, Herzberg.
K7	Methods of communication including verbal/non-verbal/building rapport/matching and mirroring. Listening skills, including levels of listening. Theories of relationship management, including transactional analysis, power dynamics, and stakeholder management theories.
K8	Theories of increasing self-awareness such as the Johari Window and the journey from unconscious incompetence to unconscious competence, and types of feedback.
K12	The existence of a range of coaching models and techniques, and related psychological approaches such as Whitmore's GROW model, Kline's Thinking Environment, Gestalt, neurolinguistic programming (NLP), cognitive behavioural coaching, positive psychology, metaphor, solutions-focussed coaching and skills, and performance coaching. Methods of goal setting, such as SMART goals. Alignment of personal and organisational goals, and aspiration/dream goals.

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) T*he Coaches Handbook: The Complete Practitioner Guide for Professional Coaches*: Routledge: Oxon, England: UK.

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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.

Clutterbuck, D. (2021) *Coachable? 'How to tell if someone is coachable'*: David Clutterbuck Partnership.

Foy, K. (2021) Contracting in Coaching: pp 345 – 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.

Gilbert, A. & Whittleworth, K, (2009) *The OSCAR Coaching Model: Simplifying Workplace Coaching*: Worth Consulting: Monmouth: UK.

Hawkins, P., & McMahon, A. (2020) *Supervision in the Helping Professions*, 5th Edn, Open University Press, Maidenhead, UK.

Hawkins, P., & Smith, M. (2013) *Coaching Mentoring & Organisational Consultancy: Supervision, Skills & Development* Open University Press, Berkshire, England, UK.

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

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

Jackson, P.Z., & McKergow, M. (2007) *The Solutions Focus Making Coaching & Change Simple*: Nicholas Brealey Publishing. London. UK.

Kline, N. (1999). *Time to Think: 'Listening to Ignite the Human Mind'*: Ward Lock. London: UK.

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

O'Connor, J. (2021) *NLP Workbook A practical guide to achieving the results you want*. Red Wheel Publishing: Newburyport, MA.

Passmore, J., & Turner, E. (2018) 'Reflections on Integrity' – The Appear 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.

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_Framewor.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	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.

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