**SESSION 1: COACHING AS A LEADERSHIP PRACTICE**

*How can I enable others to achieve purpose in the face of uncertainty?*



**ORGANIZING INSTITUTE**

**ACKNOWLEDGEMENTS**

We welcome your suggestions for improving this guide further for future trainings. We also welcome you to use it and adapt it for your own trainings, subject to the restrictions below.

This workshop guide has been developed over the course of many trainings by Liz Pallatto, Joy Cushman, Jake Waxman, Devon Anderson, Rachel Anderson, Adam Yalowitz, Kate Hilton, Lenore Palladino, New Organizing Institute staff, MoveOn Organizers, Center for Community Change staff, Jose Luis Morantes, Carlos Saavedra, Sean Thomas-Breitfeld, Shuya Ohno, Petra Falcon, Michele Rudy, Hope Wood, Josh Daneshforooz, Melanie Vant, Uyen Doan, Abel R. Cano, Voop de Vulpillieres and many others.

**RESTRICTIONS OF USE**

The following work [this workshop guide] is provided to you pursuant to the following terms and conditions. Your acceptance of the work constitutes your acceptance of these terms:

* You may reproduce and distribute the work to others for free, but you may not sell the work to others.
* You may not remove the legends from the work that provide attribution as to source (i.e., “originally adapted from the works of Marshall Ganz of Harvard University”).
* You may modify the work, provided that the attribution legends remain on the work, and provided further that you send any significant modifications or updates to marshall\_ganz@harvard.edu or Marshall Ganz, Hauser Center, Harvard Kennedy School, 79 JFK Street, Cambridge, MA 02138
* You hereby grant an irrevocable, royalty-free license to Marshall Ganz and New Organizing Institute, and their successors, heirs, licensees and assigns, to reproduce, distribute and modify the work as modified by you.
* You shall include a copy of these restrictions with all copies of the work that you distribute and you shall inform everyone to whom you distribute the work that they are subject to the restrictions and obligations set forth herein.

If you have any questions about these terms, please contact marshall\_ganz@harvard.edu or Marshall Ganz, Hauser Center, Harvard Kennedy School, 79 JFK Street, Cambridge, MA 02138.

# **Coaching as a Leadership Practice**

Goals for this session:

* To learn a simple diagnostic framework and a 5-step process for coaching others in organizing efforts
* To practice the coaching process through role-plays and reflective discussion

**Why is coaching an important organizing practice?**

***Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching enables others.***

Organizing campaigns are rich with challenges and learning opportunities, but sometimes we are fish in our own water and we cannot see the challenges we are swimming in. Coaching in organizing helps to alleviate this problem. Coaching helps individuals to overcome motivational, strategic, and informational challenges that might otherwise hinder the progress of the individual, and/or the team, and thus the campaign or training.

**What is coaching in organizing?**

***Coaching is a direct intervention in an individual or team’s work process to help them improve their effectiveness.***

Coaching is a leadership practice that is useful in a variety of contexts in organizing campaigns and trainings. Some examples of when coaching skills are necessary:

* Helping an organizer overcome motivational challenges with their volunteers
* Assisting a leadership team in creating strategy for their organizing campaign

**Coaching is useful whenever we are working to enable others to build their own capacity to act, and though the contexts vary, the process is very similar throughout.**

**Elements of Coaching**











Coaching requires learning to identify a person’s or team’s strengths and weaknesses to help them draw upon their strengths to overcome their weaknesses. People often know what they “should” do. But fresh eyes can help diagnose specific challenges they face while identifying ways to deal with them.

* **Motivational (heart) coaching** is intended to enhance *effort.*
* **Educational (hands) coaching** is intended to help acquire information or skills
* **Strategic (head) coaching** is intended to help evaluate how to use resources to achieve outcomes.

**Coaching Approaches**

**Corrective**

Some coaching is aimed at helping improve poor performance (i.e., the coachee is overall not doing the leadership practice well and needs help getting up to a basic level).

**Developmental**

Some coaching is aimed at helping the individual achieve mastery (i.e., the coachee does the leadership practice well and is ready to become expert).

Basic elements of coaching are the same (i.e., motivational, strategic, and informational), but coaching strategies may differ (e.g., consult by asking reflective questions to develop mastery vs. consult by providing expert feedback to illustrate errors in how they are thinking about the task).

**How Coaching Works – the 5 Step Process**

Coaching requires learning how to use four methods to implement 5 steps. The four methods are: asking questions, listening (head and heart), supporting, and challenging. These are the 5 steps.



1. **Observe**: What do I see and hear?

Listen very carefully, observe body language, and ask very focused probing questions to satisfy yourself that you “get” the problem. It may take time to get the facts straight. But if you don’t get the problem, you can’t help solve it. Don’t be shy about asking specific “stubborn” questions. This process can help the coachee articulate just what the problem is in a way they may not have before. So, it’s not only “getting information.”

1. **Diagnose:** Why is the problem a problem?

Getting the diagnosis right really matters. For example, if an organizer is struggling with strategy and you focus on getting them to try harder the result will only be frustration.

*Is the challenge* ***motivational*** *(effort/heart)?*

Is the individual struggling because s/he is not putting forth enough effort? Is she not trying hard enough because she’s embarrassed? Is he quitting too soon because of frustration or fear? Is s/he getting interference from other habits (e.g., someone well-versed in marketing speak may not know how to tell an authentic story)?

*Is the challenge* ***educational*** *(information/skills/hands)?*

Is the individual struggling because he lacks the skill to execute effectively? Does he not know how to do it? Is she getting interference from older habits or behaviors (like someone who is so used to selling things confusing this with telling a story of self)? Is it something you could model or role-play with them?

*Is the challenge* ***strategic*** *(strategy/head)?*

Is the individual struggling because s/he doesn’t know how to use the information or skills that she does have. Does he understand the concepts or underlying principles clearly? Has he not thought it through carefully? Are the goals not achievable? Does the strategy make sense?

1. **Intervene – What do I do?**

Once you think you’ve figured out what the problem is don’t just tell the coachee what you think he should do! Find out what she thinks she should do? Ask questions that enable the coachee to see the problem, and for you to see how the coachee sees the problem, and discern a way to solve it. Get the coachee’s views out on the table. The appropriate intervention depends on the diagnosis.

If the challenge is **motivational,** you can:

* Encourage and exhort—you can do it!
* Offer a kick in the pants (with love)
* Help the person confront his or her fear, embarrassment, or other emotion that may get in the way of their ability to risk acting, persevering, trying new things. Communicate with empathy, hope, and affirmation of the coachee’s self-worth. Reward and praise courage
* Model courage and emotional maturity in your own behavior confess fear and explain how you move toward it rather than away from it.

If the challenge is **educational,** you can:

* + - Model the behavior and invite the coachee to imitate you to get the “feel” of the activity
		- Break it down into small parts and invite the individual to try one at a time
		- Offer three or four different practice exercises and observe which ones “take” for that person.
		- Suggest others with whom the person can practice.
		- Suggest ways to figure out where to find the missing information.

If the challenge is **strategic,** you can

* + - Work through a specific example with the person, asking questions to guide the strategic process. Then reflect on the process itself, asking them to describe how it worked?
		- Ask questions about how the individual is thinking about the practice (“Why did you choose that tactic?”)
		- Offer your observations, asking how the person might think about it differently (“At that point, were there other options? What might they have been? Why did you choose the one you did?)
		- Offer feedback on what you are hearing, asking if that describes the situation, at the same time, offering possible reframing of it.
		- Use silent reflection and self-diagnosis (“Why don’t you take a moment to think through what you believe is working and not working and let’s talk about that?).
1. **Debrief: What did the “coachee” learn?**

Ask your coachee to summarize his or her “take away” from the session, commit to next steps, and decide when you will check back in. What went well? What are you challenged by? What are some possible solutions? What are your goals/next steps?

1. **Monitor: How can I continue to support the coachee?**
* Schedule periodic check-ins to support your coachee in integrating this new or revised solution into their regular practice.
* Find out from the coachee how the situation has changed.
* Assess whether the diagnosis and intervention was successful. Celebrate success!

| **Effective coaching is** | **Effective coaching is not** |
| --- | --- |
| Showing up and being present to another person’s experience and listening, with both your head and heart | Being so prepared that you work out all the answers for the coachee before you even hear or observe their challenges |
| Helping the coachee explore and make sense of their challenges and successes, and what they learned from it all | False praising of the coachee or only focusing on their strengths because you do not want to hurt their feelings |
| Helping the coachee to find solutions to challenges | Solely criticizing the coachee |
| Asking questions that both support and challenge the person you are coaching | Telling the coachee what to do |

### **TEAM BREAKOUT SESSION:**

LAUNCH YOUR TEAMS & COACHING PRACTICE

**GOALS**

* Practice the coaching process by coaching around real leadership challenges.
* Reflect on the process and framework for coaching in organizing and leadership.

***AGENDA***

**TOTAL TIME: 20 min in groups of 2.**

|  | **Practice coaching*** Decide who will be coach and coachee in first round.
* In 3 sentences, the coachee briefly describes the leadership challenge\* they are facing and receives coaching from the coach. ***The coach asks questions and paraphrases only.***

**Feedback for the coach*** What question was most helpful? What did the coach do well in terms of process?
* What could the coach improve next time?

**Switch roles and repeat practice** **Feedback****Afterward,*** If you have extra time, debrief:
	+ How was this coaching process different from giving advice or providing someone all the answers?
	+ What did the coach do well; what could be improved?

\*this should be a real leadership challenge: something you are working to advance and are having challenges in doing so | 8 min.  2 min 8 min 2 min |
| --- | --- | --- |
|  |  |  |

### **COACHING WORKSHEET:** MCj04106050000[1]

Use this worksheet to record your observations, diagnosis and the type of intervention you would use as a coach during the role-plays.

|  | **Observations (symptoms)** | **Diagnosis** | **Intervention** |
| --- | --- | --- | --- |
| **Motivational****(Heart)** |  |  |  |
| **Strategic****(Head)** |  |  |  |
| **Skill-based****(Hands)** |  |  |  |

### **COACHING WORKSHEET 2:**

#### Debriefing Coaching and Facilitation

Use these questions to help you reflect on your own skills and to help provide feedback to others on their coaching skills.

| **WHEN YOU ARE THE COACH:** |
| --- |

How did you manage the conversation? What worked?

What could you do differently to elicit more details?

How did you facilitate the organizer’s learning?

What are your key takeaways?

| **WHEN YOU ARE THE COACHEE:** |
| --- |

What did you find most useful for your own learning? Why?

What helped you get more specific or clear on your project?

What would have been useful? Why?

What are your key takeaways?

### **KEY TAKEAWAYS & SESSION NOTES:**

#### Debriefing Coaching and Facilitation

What are your key takeaways about coaching as a leadership practice?

What questions do you have?