Performance Coaching Process Guidelines

Process Review and Goals

At a staff meeting at least once a year, Department Heads should review the process and the benefits of the program. The most important aspect of the program is that it provides the opportunity for staff members and their supervisors to have a conversation about job performance, ways to improve performance, obstacles employees face in performing at an optimal level, ways to improve job satisfaction for the staff member and ways to help employees advance their careers. Specifically, the goals of the coaching process are to:

- Motivate and retain staff members.
- Help staff with their career development.
- Let staff know how they are doing with their job.
- Recognize accomplishments.
- Establish goals for the coming year.
- Inform staff of any possible trouble areas with their job performance.

Job Descriptions and Performance Coaching

Job descriptions should be reviewed annually by staff and supervisors. If changes are needed its best that staff members and their supervisors revise the description and submit it to Human Resources before the coaching process occurs. The job description should not be a focus of the coaching sessions.

Worksheets

The sheets are available on the Human Resources web site
http://www.brynmawr.edu/humanresources

Coaching Input Sheet (Yellow sheet)

Supervisors should make a 45 minute appointment with staff members, a week in advance, to review the Coaching Input Sheet. The staff member should complete the worksheet before the meeting. Staff members who would like help with the sheet should contact Human Resources and a Senior Coach will be asked to help, or a staff member may ask for assistance from a co-worker.

The number of bullets in each section of the form are a suggestion of the number of comments that should be included; however, staff members may have fewer or more comments than the number of bullets. Staff members may have no comments for some sections and that is OK, but the supervisor should ask questions to make sure that the staff member doesn’t want to make a comment.
During the introduction to the meeting supervisors should:

- Ask if the staff member has any questions about the process.
- Let the staff member know that this meeting should take about 45 minutes.
- Let the staff member know that the meeting is for him or her to present the input sheet and that the supervisor is there to listen, ask questions and take notes.

Important points for supervisors to remember during the coaching session

1) Do not argue or correct the information presented. Questions should be asked only to clarify the information.
2) Try to understand the information presented and not judge it.
3) If the information presented is too general ask open-ended questions such as:

   (a) Can you tell me more about that?
   (b) How did that make you feel?
   (c) Can you give me an example of what you mean?
   (d) What was the impact of that accomplishment?

4) To make sure the information presented is understood ask specific questions or check your understanding by asking questions such as:

   (a) How many staff members benefited from this accomplishment?
   (b) What I hear you saying is…….. Is that correct?
   (c) In summary, you feel………..

5) Make supportive comments such as:

   (a) That is quite an accomplishment.
   (b) I appreciate hearing that.
   (c) I know how important that accomplishment was to the department.

6) Make closing comments

   (a) Thank the staff member for their effort in preparing the input sheet.
   (b) Let the staff member know that the conversation helped you understand and appreciate the work accomplished.
   (c) Preview the next step which is the review of the coaching worksheet.

**Coaching Worksheet (Blue Sheet)**

Supervisors complete this worksheet before the session to review the coaching input sheet (yellow sheet). The Coaching Worksheets may be changed or appended by the supervisors after the sessions to review the coaching input sheets.
The coach’s supervisor must sign the Coaching Worksheet before it is presented to the staff member. This ensures that the coach understands the coaching process and that the coach’s supervisor is aware of any significant performance issues.

A meeting of about 45 minutes should be scheduled to review the Coaching Worksheet about one week after the first session. Supervisors who would like help completing the sheet may request help from their supervisor or from Human Resources.

The number of bullets in each section of the form are a suggestion of the number of comments that should be included; however, supervisors may have fewer or more comments than the number of bullets.

During the introduction to the meeting supervisors should:

- Remind the staff member that the purpose of the meeting is for the supervisor to give some feedback.
- Encourage the staff member to ask questions or make comments. The supervisor should lead this session but it is much more of a conversation than the first session.
- Let the staff member know that the supervisor will give him or her a copy of the worksheet at the end of the session.
- Let the staff member know that this meeting should take about 45 minutes.
- Let the staff member know that he or she can take notes.
- Give an outline of the worksheet. The staff member’s greatest strengths will be covered first, followed by areas for focus in the coming year and recommendations for development opportunities for the staff member.

Important points for supervisors to remember during this coaching session:

- The information on the worksheet should be presented clearly.
- Be diplomatic and strive to be positive.
- Ask if the information presented is understood. Offer to give additional examples to ensure clear understanding.
- Ask staff members what they think about a comment if it is not clear that they fully understand it.

**Strengths Section of the Worksheet**

Write a brief summary of a strength, followed by an explanatory sentence or two and a couple of examples. Be as specific as possible in the examples. It is a good idea for supervisors to keep notes during the year of employees’ good work that can be included as specific examples of strengths. Explain how the strength impacts the College.

Example: Initiative and Reliability: Someone who takes responsibility for getting the job done whether it specifically falls within their job description or not, and who is dependable. In April you volunteered to lead a training session for the department in new technologies.
Areas For Focus during the coming year

The reason for the name change from “Areas For Improvement” is that these comments often do not address areas for improvement, but rather addressed areas in which work is needed in the coming year. “Areas of Focus” more clearly described this section. Also, in this section on the original form, there were three categories of comments; however, two of the categories have been eliminated. The “job threatening” box does remain.

Areas For Focus can be one of the following and the comment should make it clear which it is:

1. Work begun during the past year that needs to be continued or completed. The work may be very good, but it is just not finished. If there needs to be improvement in the work that should be explained clearly.
2. Work that wasn’t done as well as it should have been done or as completely and needs more effort.
3. Work that was done poorly or not at all and needs to be a major focus for the year. This can be a job threatening comment, and if it is, the job threatening box should be checked. Before a job threatening box is checked, the Department Head and Human Resources staff must be consulted.
4. New work that needs to begin in the coming year.

Example: Communication: continued emphasis on assuring that all members of your department or team are informed of current policy or procedural changes that impact them either individually or as a team member.

If significant advancement or completion of a job assignment enhances the potential for advancement at the College or advancement in the staff member’s career, this should be indicated.

Development Recommendations

Development recommendations should refer to the Areas of Focus and should include specific plans for the staff members to be successful in performing the work listed in the Areas for Focus. Wherever possible, supervisors should include specific plans for helping the employee in performing the work. This might include periodic reviews of the work to check progress and make suggestions, helping the employee find training opportunities at the College or outside of it to improve needed skills, suggestions on other College staff members who might be consulted etc.

At the conclusion of the session supervisors should do the following:

1. Give the staff member a copy of the worksheet
2. Ask the staff member if they have any final questions or comments
3. Give the staff member a blank Personal Development Form and ask that it be completed within one week. Explain that the Areas for Focus should become goals in the Personal Development Plan. Schedule an appointment for 30 minutes to review the Plan.
4. Thank the staff member for their work and their time and attention during the meeting.

**Personal Development Plan (Green Sheet)**
*(This session/form is optional either at the request of the staff member or coach)*

The Areas for Focus should become goals in the Personal Development Plan. Let staff members know that if they are unclear about how to do that, the staff member and supervisor can establish the goals together at the meeting to review the Plan.

**Process after the three sessions are complete:**

1. Make sure that the Coaching Worksheet (blue form) has been signed by the supervisor and employee. It is the only form that must be submitted to Human Resources. Copies of all three sheets should be kept in the staff members’ departmental file.

2. If the staff member or supervisor feel that the coaching sessions did not go well, Human Resources should be contacted so that a Senior Coach can be asked to meet with the supervisor and staff members to review the process and provide suggestions for improving it in the future.