

Coaching & Mentoring Consultants

Mary Connor Julia Pokora

Coaching & Mentoring Development Programme

Workbook 2021

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COACHING & MENTORING CONSULTANTS

Julia Pokora is a co-founder of Coaching and Mentoring Consultants and co-author of 'Coaching & Mentoring at Work: Developing Effective Practice', which is now in its 3rd edition. Following an early career with BP and Exxon, Julia established an independent organisation and management development consultancy, and at that time was an Associate with Ashridge Teamworking Services. She has many years' consultancy experience and has worked with private and public sector organisations in the UK and overseas. In recent times she has focused on developing the mentoring and coaching capability of doctors, dentists and other professionals in the health service. She has, with colleagues, designed and delivered coaching and mentoring training in Deaneries, Trusts and Royal Colleges. She has an MSc Occupational Psychology and a Graduate Diploma in Counselling.

Dr Mary Connor is an independent consultant, mentor, coach, trainer and supervisor. She is co-author of 'Coaching & Mentoring at Work: Developing Effective Practice', OUP 2017. She has been involved in developing coaches, mentors and supervisees as well as developing mentoring training and research for almost twenty years. Her work has been with those in both the public and private sector. She has worked in postgraduate medical and dental education with several Deaneries and Trusts throughout the UK. She brings to mentoring training considerable experience of working with Professor Gerard Egan, author of 'The Skilled Helper.' Her Health Service work has included course leadership of a Master of Arts degree in Leading Innovation and Change when she was a Principal Lecturer at York St John University and Honorary Fellow at the Centre for Leadership Development at the University of York. She is a member of the NHS York Research Ethics Committee. She is a member of the European Mentoring and Coaching Council (EMCC).

Dr June Smailes, Tutor. After graduating from Sheffield University Medical School, June worked in hospitals in the UK and the Caribbean and subsequently as a GP and NHS Breast Physician in Sheffield. She has held leadership roles at Board level both in the NHS and the Charitable Sector. As a Director of Trent Accreditation Scheme she had the opportunity to work with local healthcare professionals to identify and address developmental opportunities in healthcare settings in Hong Kong, Singapore, Cyprus and Malta. Having trained as a GP appraiser in 2006, she has since appraised healthcare professionals in Sheffield and Malta. Since attending the Coaching and Mentoring Development Programme she has applied this knowledge in a wide variety of settings and has recently been appointed as an LMC Mentor for GPs in Sheffield. She has regularly contributed to the programme since 2008, becoming a tutor in 2016.

INTRODUCTION TO THE WORKBOOK

This workbook is for use only on programmes provided by Coaching & Mentoring Consultants. It is used alongside the course handbook which is:

Coaching and Mentoring at Work: Developing Effective Practice
Mary Connor & Julia Pokora, 2017, Open University Press.

Over 2000 people around the UK have attended Mentoring Development Programmes since the first in the Yorkshire Region in 1994. Programmes have been delivered for NHS Trusts, Deaneries, Royal Colleges and Specialty groups.

Participants come from a wide range of NHS organisations and include consultants from acute and community Trusts, SpRs, GPs, dentists, public health doctors, nurses, midwives, pharmacists and managers. A distinctive feature of our approach is the focus on developing skills that health professionals can use in everyday working life. The NHSU evaluation report (2005) described the programme as providing ‘a benchmark mentor development programme for the NHS’.

This workbook is designed to support you in developing your coaching and mentoring skills and so be helpful to you and those whom you coach and mentor.

We would be delighted to receive your reactions to this workbook, as well as any updates, corrections, or suggestions for additional material for inclusion in the next edition.

Mary Connor Julia Pokora
Coaching & Mentoring Consultants

PROGRAMME AIMS

1. Define coaching and mentoring and understand the benefits
2. Introduce a framework for coaching and mentoring
3. Develop coaching and mentoring skills
4. Explore practical application of coaching and mentoring at work

OBJECTIVES & LEARNING OUTCOMES

By the end of the course, participants will have

- Understood a coaching / mentoring approach
- Been introduced to Egan's 'Skilled Helper' model (2010)
- Understood the key elements of each of the 3 stages of Egan's model
- Practised each stage of the model and reviewed their skills development
- Reviewed their own learning from the each day, and identified aspects of the model to practise
- Considered how to use the model and skills appropriately at work
- Started to use the model and skills in practice

COURSE READING

Handbook

Connor, M and Pokora, J. 2017 Coaching and Mentoring at Work: Developing Effective Practice, 3rd edn. Open University Press.

Additional Material

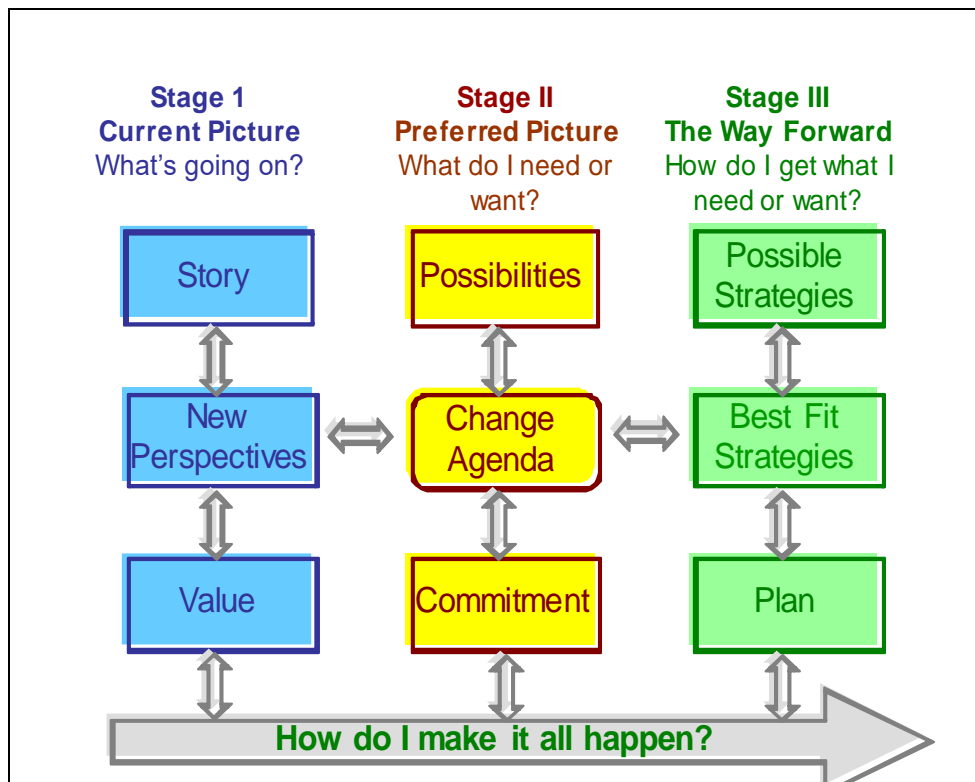
Egan, G. 2010 The Skilled Helper, 9th edn. Brooks/ Cole Cenage Learning.

PRINCIPLES FOR EFFECTIVE COACHING & MENTORING

‘Coaching & Mentoring are learning relationships, which help people to take charge of their own development, to release their potential and to achieve results which they value’ (Connor & Pokora 2012)

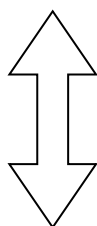
- 1 The LEARNING RELATIONSHIP is at the heart of change
- 2 The CONTEXT is Work
- 3 The MENTEE sets the agenda and is resourceful
- 4 The COACH OR MENTOR facilitates LEARNING AND DEVELOPMENT
- 5 The OUTCOME is CHANGE
- 6 The FRAMEWORK for the change process provides movement & direction
- 7 The SKILLS develop insight, release potential & deliver results
- 8 The QUALITIES of the coach or mentor affirm, enable and sustain the mentee
- 9 ETHICAL PRACTICE safeguards and enhances coaching and mentoring

THE SKILLED HELPER MODEL (Egan, 2010)

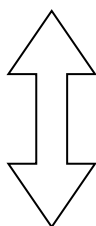


STAGE ONE

What do you want to talk about?



What might you have missed?



What is most valuable to work on?

Telling the story

Enabling the mentee to tell their story

- Attend – verbal and non-verbal
- Listen for thoughts, feelings and actions
- Respond (*you think..and you feel..?*)
- Reflect, paraphrase, summarise, echo key words, use open questions, allow silence
- Because...?

Developing new perspectives

Checking for new perspectives & blind spots

- *The way in which it's an issue for you..?*
- *What would...say if they were here now?*
- *Anything you might you be overlooking?*
- *What are your strength/resources?*
- *Is this a pattern for you?*
- *What has helped in the past?*

Choosing where to focus

Helping the mentee to work on something that will make a difference, that if addressed would add value to their life

- Summarize all the parts of the story
- Focus and prioritize
- What do you have the energy for right now?

- *Out of all of this, is there one thing that you could take forward to work on, which would really make a difference?*

Connor & Pokora 2012 (adapted from Egan 2010)

STAGE ONE LEARNING LOG

- **What skills did you try out, and how did they work?**

- **What seemed to help your mentee?**

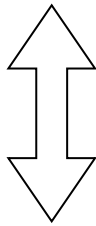
- **Did anything surprise you?**

- **What skills or parts of this stage do you need to practise?**

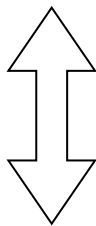
- **Any other learning points?**

STAGE TWO

In the ideal world, what do you really want?



What's a realistic goal for you?



What are the incentives?

Imagining possibilities

Encouraging the mentee to describe their ideal future in relation to the value issue

- Check the value issue and write it down
- Brainstorm the mentee's ideal future, what they really want
- Use prompts and echo key words
- Encourage hope & creativity

Shaping a change agenda

Helping the mentee to identify a SMART goal

- Critiquing the brainstorming list
- What's most important & most realistic for the mentee?
- Ask the mentee to state their goal using this phrase : *By...I will have...and I will feel...*

Testing commitment

Checking if the mentee really wants the goal

- *What are the benefits, the positives, the payoffs, for you and others?*
- *What are the negatives, the costs, the disadvantages for you and others?*
- *What has stopped you up until now?*

Connor & Pokora 2012 (adapted from Egan 2010)

BRAINSTORMING IN STAGE 2

- ✓ *Explain* the process
- ✓ *Give permission* to let go of the present
- ✓ *Encourage* new ideas and fun
- ✓ *Keep a fast pace ... brief recaps*
- ✓ *Use present tense prompts* and build on these
- ✓ *Write down* the mentee's key words

SOME 'WHAT' PROMPTS TO HELP THE MENTEE DESCRIBE THEIR IDEAL

describe your ideal...

ideally, who is there?

ideally, what have you started doing/ stopped doing?

ideally, what are you thinking/ feeling?

ideally, what's the one thing you've changed most?

imagine it's sorted...perfectly...what's happening?

ideally, what are people saying about you?

in your dreams, what is it like?

picture in your mind's eye

imagine there are no constraints

what's the icing on the cake?

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STAGE TWO LEARNING LOG

List some brainstorming prompts that you will try out in the future

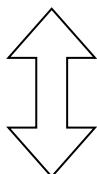
How did your mentee benefit from working with you in this stage?

What parts of this stage do you feel comfortable with using, and what do you need to practise more?

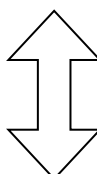
Anything else you learnt from this practice?

STAGE THREE

What strategies
will help you
get what you
want?



Which makes
most sense for
you?



What is your
action plan, and
how do you get
started?

Exploring possible strategies

Helping the mentee to think creatively about all the different ways to achieve their goal

- Start by getting the mentee to state the goal
- Now focus on HOW the goal could be achieved – brainstorming all the different ways
- Use prompts and echo key words
- Encourage hope, creativity and new ideas

Choosing best fit

Helping the mentee to choose the ways most likely to work for them

- Critique the brainstorming list
- Ask which ways fit best with the mentee's values, personality, style and resources?
- Use force-field analysis to identify what will help or hinder success

Formulating a viable plan

Encouraging the mentee to shape up a specific plan of action

- Identify key steps to achieve the goal, and plot milestones & timescale
- Check that the action plan is realistic
- Discuss how to manage contingencies

Connor & Pokora 2012 (adapted from Egan 2010)

BRAINSTORMING IN STAGE 3

- ✓ *Explain* the process
- ✓ *Give permission* to let go of the present
- ✓ *Encourage* new ideas and fun
- ✓ *Echo* key words
- ✓ *Use how prompts* and build on these
- ✓ *Stay with it* and *keep a fast pace*
- ✓ *Write down* the mentee's key words

SOME 'HOW' PROMPTS TO HELP THE MENTEE TO GENERATE STRATEGIES

how could other people help you? who?

how could places or organisations help you?

how could technology help?

how could you use your strengths & resources?

any precedents or ways that have worked for others?

if there were no constraints how would you tackle this?

what would you really like to do?

what strategies work best for you?

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STAGE THREE LEARNING LOG

What are your strengths in Stage 3?

What do you need to practise in Stage 3?

What part of this stage seemed most useful for your mentee?

As mentee, what part of this stage did you find most useful?

Nine(ish!) Questions to use when practising The Skilled Helper Model

STAGE 1 What's Going On?

- 1 What would you would like to explore today?
- 2 Have you overlooked anything?
- 3 Where should we focus – is there something that we could work on which would really make a difference?

STAGE 11 What Do You Need or Want?

- 4 Thinking about your chosen focus, what ideally do you want?
- 5 From this wish-list, what is a smart goal? (*I will...by...and I will feel...*)
- 6 What are the benefits and costs of that goal?

STAGE 111 How Do You Get What You Need or Want?

- 7 How many different ways are there to achieve this goal?
- 8 What is 'best fit' for you? What might help or hinder?
- 9 What is your action plan? Time-frame? Contingencies?

***Space for you to write down useful local contacts for support or networking,
and any additional notes***