



Training Activities + Tools

Guardian As Coach

Training Participant Guide



TRAINING HANDOUT
guardianshipcenter.org

Guardian as Coach: Best Practices for Helping People Develop + Grow

Participant Guide

Welcome to our workshop. Guardians who coach demonstrate leadership, caring and skill. These are valuable and important qualities to bring to a job that is already quite meaningful.

In this training, we will explore and discuss:

1. Definitions from the world of coaching. This will help frame our conversations and help you to make decisions about the approaches best suited to your personality and real-world challenges.
2. The concept of "Occasional Coaching." What it means and how we can apply well-known sales and influencer strategies that can cause someone to change.
3. How to create "Small Wins" using a 4-part process. Trust, Observation, Feedback and Results are what move the compass needle to someone's true north.
4. Strategic planning so you can adjust your current coaching approaches, blend in new strategies you learn today, and create a better outcome for the people you choose to coach.

Defining the word "Coach"

"Vehicle for moving very important people from where they are to where they want to go."

If our definition states we move people "where they want to go," does that suggest we can only coach people who are willing participants? The answer is "yes."

Coaching requires willing participants. As we deepen our discussion about the coach's best practices and some strategies you may want to consider trying, think about the individuals you are trying to support.

You may support someone by being a listener, advocate, adviser, teacher, motivator, decision-maker, etc.

But being someone's coach has a deeper meaning with specific actions and observable or measurable goals. Goals may even include limiting or ending their guardianship because they have learned to do for themselves the tasks previously performed by a guardian. In the next 3 hours we will explore steps you can take to become an effective coach to the person or people who matter to you.

The "Culture of Coaching"

Some folks grow up participating in competitive sports or activities. They learn to be on teams. They learn that an authority figure is the boss, and that a peer can be elected captain. They experience being observed, getting feedback, winning and celebrating, losing and plotting to win next time.

As adults, these same people may experience being coached when working in an environment that has a culture supportive of coaching. They understand a culture of coaching and thrive in it. Relationships are built between new hires and tenured staff. Everyone is expected to improve and bring greater value to the organization year after year.

But what about other adults whose coaching experience ended as soon as they grew up? They may view becoming a "coachee" as childish.

And, what about people who have never been coached at all? At best, they may be supervised by a trained or untrained, skilled, or unskilled person.

These facts create some challenges for guardians who want or need to coach.

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Participant Guide

Coaching Styles

From University of Kansas. <https://onlinesportmanagement.ku.edu/community/styles-of-coaching>

3 Styles for Discussion	Characteristics of Each Style	When is each style most useful?
Holistic	Coach keeps away but is available when asked. Minimal observation and little positive or corrective feedback.	
Democratic	Coachee-centered goals, process, and timelines. Plentiful observation and feedback at a pace suited to the coachee with goals the coachee agrees to.	
Autocratic	Obey Coach, or you are out. Plentiful observation and feedback aimed at compliance, skill-building, and achieving goals.	

Who is "My Coach?"

Guardians have the opportunity to become "my coach," the person who is remembered and appreciated forever.

Only the best of the best become important to people they coach.

Outside of the sports world, "my coach" tends to adjust the amount of time and power they assert depending upon what makes sense for, or what has impact on the individual.

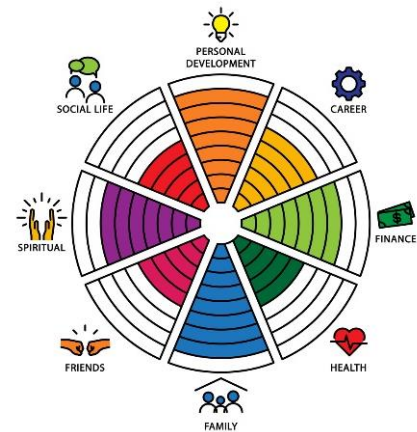
It all begins with trust. When you think about who you trust and who trusts you, you can begin to get a glimpse of whose life you might not only improve but have a lasting impact on.

If you manage guardians, you can help 1 or more of those guardians become great.

If you are a guardian, you can help a client become skilled at something that enhances his or her independence. In fact, the person may succeed at becoming independent enough to limit or end the guardianship.

Is there someone in the wheel of your life who you think about this way?

If so, what did that person do that made the experience valuable and memorable?



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Participant Guide

Two Types of Coaching Situations

COACHING SITUATIONS

OFFICIAL COACH

Your responsibility to this person includes helping the person develop, grow, and succeed.



Your child



Your client



Britney Spears



Your direct report employee

VS

OCCASIONAL COACH

You feel a sense of responsibility to educate and inform this person even though you have no specific authority.



Your client's service providers



Your client's family

Who in your world gets which coaching? Can you explain why?

Every irritating person or interaction does not warrant your coaching time + energy. Pick your coaching opportunities carefully. Don't be so quick to coach that you start trying to coach everyone whose actions seem to need fixing. That will be exhausting. And, you may be missing the chance to get the cooperation or information that you need from someone.

Coaching is for creating long-term change that has enduring value.


Official Coaching	Occasional Coaching

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Participant Guide

Tanya's Challenges Part 1

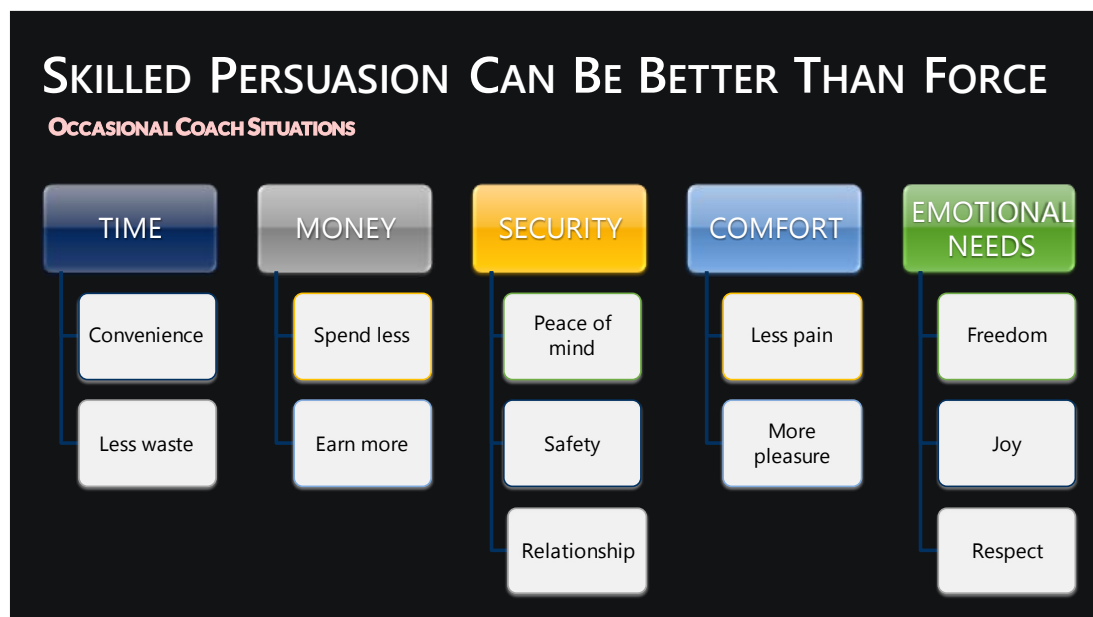
Tanya Guardian is sharing 2 challenges with her client, Tim.

<p>Are these Official Coaching or Occasional Coaching situations?</p> <p>The doctor won't look at my client, Tim, when he talks. He asks me questions Tim can easily answer. It's demoralizing and rude, in my opinion. How can I get him to treat Tim better?</p> <p>Tim's family tries to drag me into their conflicts. This week they are arguing over Tim inheriting grandma's house old house. How do I get them to understand I am not their mediator</p>	
<p>How forceful does Tanya Guardian want to be?</p>	

The 5 Things Adults Value

Persuasion can mean "to move or change someone by presenting information or illustrations." The easiest way to persuade an adult is to appeal to what the person values most dearly.

At any given moment, an adult will prioritize one of these categories of needs. For example, someone may spend extra money at a more convenient store because it saves time. Another person may drive ten miles north to save \$3 on gas because money is tight that week. People buy insurance and hope to never use it spending money to gain peace of mind that in case of a house fire, their home will be rebuilt. Someone might sleep on a velvet sofa in the living room rather than climb stairs that hurt their knees, even though the upstairs bedroom is private. Someone else might sleep anywhere that was not controlled by a parent because freedom matters more than comfort, at that time.



SKILLED PERSUASION BRIDGES + CLOSES

OCCASIONAL COACH SITUATIONS

TIME MONEY SECURITY COMFORT EMOTIONAL NEEDS

- Bridge into persuasive conversations with empathy or by stating you have an idea.
- Include how the idea may address 1 or more the needs you believe are important to the person.
- Ask for permission to continue (determine level of interest/cooperation).

Listen for permission to continue.

- Include exactly how the action you recommend will address the person's values or needs.
- End with a question that asks for agreement or acceptance.
- Be honest.
- Explain your ideas clearly.
- Speak slowly, plainly, and kindly.

Bridges + Closes Using 2 "Statement/Question Pairs"

Example 1:

Dr. Thomas, I have an idea that will make our appointments go more smoothly get faster agreement to your advice. Are you open to hearing about it?

I have observed that Tim is more cooperative if you address your questions to him and give him a minute to think. It requires patience which isn't always easy for me. But, when he knows he has choices, and he feels heard by the doctor, he feels trust and he stops arguing against you. What do you think about facing him and looking him in the eyes when you recommend a medical treatment?

Example 2:

Lois and Marion, I can understand how challenging it is to decide as a family what to do about inheritances. The court has established some guidelines for guardians that protect your assets and Tim's money from my intervention. Are you open to hearing about what I can and cannot do in this situation?

The court allows me to receive Tim's social security checks, deposit them in an account that is just for him and pay his bills. I have to document every dollar that comes in or goes out and report it to the court. This is how the court prevents my taking advantage of Tim and of your family. I am unable to participate in any family discussions, manage large assets like a house or plan for an inheritance. The court typically assigns a conservator for that work. Do you want me to explain how you can petition the court to hear from you about Tim's need for a conservator?

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Participant Guide

Useful Statements + Questions

Ideas for Statements	Ideas for Questions
<ul style="list-style-type: none">• I have an idea that might save you some...• With your permission, I have an observation I would like to share because I believe it will help to...• I see that there is a challenge here and I have a few suggestions that will give you...• Last time we met I observed something, and I have a feeling if you knew about it you could have...	<ul style="list-style-type: none">• Are you open to hearing about it?• Do you have 2 minutes to discuss this with me?• May I take a few moments to share my thoughts?• What do you think, is the timing right to talk about this?

Voluntary Skill Practice: Occasional Coaching

Who will volunteer to share an occasional coaching situation and allow us to work through a bridge statement/question pair and a close statement/question pair?

(Use this space to collect your thoughts and suggestions from the class.)

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Participant Guide

Official Coaching: Factors that inform your approach (4 steps)

When it comes to coaching clients, employees, and kids, different situations and people call for different approaches. So, how do great coaches decide what actions to take and words to use?

Trust	Observation	Feedback	Results
<p>How you think or feel about the person you are coaching.</p> <p>Plus, how that person thinks or feels about you.</p>	<p>What you see the person do or try to do.</p> <p>The skills you are trying to help the person build.</p>	<p>Statements to encourage or reinforce what someone does well.</p> <p>Conversation to engage the person in activities of change.</p>	<p>Information you share that helps the person catch a vision of the future (includes the results of a change effort or consequences of not changing).</p>

Trust Factors. Be aware and beware. Trust can be a process. Trust can be broken.

Trust can be defined as a firm belief in the reliability, truth, ability, or strength of someone or something. These 4 factors can contribute to the feeling of trust.

Reliability. I show up as promised and when needed. I make sure you know in advance what's expected/needed.

Openness. I don't know everything and can admit my weaknesses. I find common ground and build rapport, so you know you are liked and respected. If I let you down on that rare occasion, I acknowledge or apologize.

Goodwill. I consistently give generously of my time, knowledge, patience, and support. I don't belittle anything about you, your background, home, family, beliefs, etc. I avoid sarcasm or teasing that could be hurtful or perceived as anger.

Skill. I can demonstrate. I explain things so you can understand. I show my knowledge by doing things for and with you.

Some guardians say they have clients they do not trust. Often, the guardian can identify the reasons including observations and past experiences. Can this be changed?

What about working with employees a manager does not trust? Can this be changed?

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Participant Guide

Observation Skills and Strategies

Observation. A coach’s observation skills are more important than many people realize. Observations uncover developmental opportunities.

- For clients, use an assessment tool to help focus on functional actions that may be important. Skills Assessment Tool: https://training.guardianshipcenter.org/catalog/info/id:151.cms_featured_course:1
- For employees, use a checklist they have already been taught so they know what you expect before you observe performance.

Tips for Effective Observation:

1. If you saw it or heard it, you should be able to describe your observation.
2. Take notes so you can describe what you saw and heard rather than what the person did not do.
3. Describe the facts, not your opinions about what you saw or what should have been different.
4. Clear descriptions of your observations reduce the chance the person will say “I did not do that.”
5. Avoid boiling down a set of behaviors into a judgment. Instead, list the behaviors.

Observations are neither positive nor corrective. They are facts.

Observe, Don’t Judge. Which of the 8 statements are observations?

1. Bob does not know how to give professional responses and is creating conflict for no reason.
2. Beth wrote “this is not a management problem you need to take it up with the post office.”
3. Tim is uncooperative.
4. Sid walked away from his lunch tray and never ate.
5. Nadine is struggling with her mobility.
6. Anna placed one hand on the chair and pushed but did not stand until the aide helped her.
7. Connie was rude to the center director.
8. Hugo called Amos a stupid cow.

Employees: What can and should be observed?
Where, when and how often?

- Communication by phone or email
- Report-writing skills
- Deadlines met or missed
- Skills they have identified to work on
- Other?

Clients: What can and should be observed? Where,
when and how often?

- ADLs
- Social comfort and safety
- Adherence to medical protocol
- Money management
- Skills they have identified to work on
- Other?

When someone is in a developmental process for skills they have agreed to work on, then we concentrate our observation on that specific skillset. This is the basis for a strategy called “Small Win” Coaching.

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Participant Guide

Feedback

Observations turn into written or verbal conversations that either reinforce what a person has mastered and should continue or open a discussion about ways to improve. Great coaches avoid trying to do both during the same coaching sessions.

Positive Feedback. Turn 1 observation into a sincere compliment that helps the person understand what to continue doing. *Verbally or in writing. One-to-One or in a group.*

Why does it make sense to focus on 1 observation?

There are many ways to give effective positive feedback. This model reminds us to be specific, so the person knows exactly what to continue doing.

1. **DESCRIBE** what you observed using concrete details.
2. **EXPLAIN** why it was great or the impact it had.
3. **ENCOURAGE** more of the same so the person achieves goals that have meaning to the person.

Sherri I was just reviewing your case file on Sid Stone. Your notes are excellent. You've described his medical condition in detail and his feelings about no longer enjoying food. You found some resources to help him deal with his emotions around food. You found out what he likes to eat and set up delivery from Walmart with the meats and salad kits he prefers. And he's gained 3 pounds according to your notes. I'm thrilled by your success and am very appreciative that you're on our team. I'm looking forward to reviewing the rest of your cases and seeing how you apply this same caring, through approach to every client. Thank you.

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Corrective Feedback. Turn what you observe into an interactive conversation that helps the person understand what to change.

- *Corrective feedback coaching conversations should be verbal. Email and chat are not as effective and may damage relationships.*
- *Corrective conversations are private and should be conducted where no one else can listen in.*
- *Often, corrective feedback is the beginning of a process where the coachee works to change with help from the coach.*

DALTA, There are many ways to give effective corrective feedback. Here is one model that includes the essential elements.

Please notice the series of statement/question pairs.

Please notice it begins exactly the same way as in the positive feedback model.

1. **DESCRIBE** what you observed using concrete details and no judgment words.
2. **ASK** the person's viewpoint, intentions or strategy without being confrontational. Take care to preserve the person's dignity.
3. **LISTEN** to understand what happened or is happening. Use the information to tailor what you will say or do next.
4. **TEACH/TELL/TRY** by offering another approach or action. Spend time demonstrating or allowing the person to show they can begin to adapt their behavior in order to get a different outcome. Include the impact or results expected from the change in behavior, if needed.
5. **ASK FOR AGREEMENT** on a game plan between coach and coachee to practice, observe again, get help from another resource, etc. May include deadlines and rewards.

Guardian as Coach: Best Practices for Helping People Develop + Grow

Participant Guide

Results and Rewards. Results are observable and measurable. They can lead to rewards.

Results can be defined as any improvement that achieves a goal or moves someone closer to achievement of a goal. Great coaches often set small goals (small wins) and offer small rewards appropriate to the goal.

The phrases “one day at a time,” and “one step at a time” remind us that learning and changing involve repetition without giving up.

Employee Results + Rewards	Client Results + Rewards
<ul style="list-style-type: none"> • When coaches work with team members, any goals that are set should have deadlines. Deadlines can be changed if it makes sense to do more nurturing or be more patient, but they should never be forgotten. • Coaches must work with team members. “Have this on my desk by the end of the month,” is not an example of effective coaching. It is simply assignment of a task, which has its place in business, but should not be confused with coaching. • Adults deserve to be rewarded in ways that have meaning to them by a coach who they have come to trust. Coaches should work at learning enough about each person to decide if “take you out for a lobster lunch” is a reward the person will work toward or if “\$25 gas card” or “leave early on Friday” will mean more. • Often, the development of a valuable business, career, or life skill is enough of a reward. Coaches who know a coachee well and have gained agreement on what the skill means to the person, can focus on the results as the reward. • Positive feedback is a powerful and valuable reward. After an employee masters something new, they are often thrilled hearing “You got it! Here’s what I observed (in detail and the details include everything you’ve been working on)! Here’s why it was great! Keep it up!” 	<ul style="list-style-type: none"> • For clients, typically, the development of a valuable life skill is a great reward. Coaches who know a coachee well and have gained agreement on what the skill means to the person, can focus on the results as the reward. • Some coaches turn learning into a game by offering badges or small prizes. at each coaching session when the person demonstrates effort to practice the skill they have been working on. It is important to decide and agree on these game-playing components in advance to be sure the coachee finds them fun and not childish. • Positive feedback is a powerful and valuable reward. After working for days, weeks or months to achieve a skill or perform a task, coaches can expect to see pure joy when they finally say “You got it! Here’s what I observed (in detail and the details include everything you’ve been working on)! Here’s why it was great! Keep it up!”

Guardian as Coach: Best Practices for Helping People Develop + Grow

Participant Guide

10 Questions Great Coaches Ask Themselves

This job aid is downloadable at our Learning Hub <https://training.guardianshipcenter.org/catalog/info/id:268>. It helps coaches think through the best strategies for coaching a specific person. Ask yourself some or all of these questions before you approach someone and begin to coach. You will see that it reviews what we have already discussed in this training.

1. Do I admire or respect this person?

2. What level of trust (cooperation) is already built?

3. What is one observation that I can describe in detail that the person does well and should continue?

4. What can I tell this person about what I saw or understand and create a positive feedback conversation?

5. What is another observation that I can describe in detail where a change of behavior would have a better outcome for the person?

6. Am I qualified to teach this new skill or behavior, or is there someone else I can engage to help this person?

7. Where is a private place where I can have an interactive conversation to discuss my observations and find out if the person is willing to work toward improving?

8. Can I identify negative consequences if person does not work toward the goal, or positive results if the person does, and how should I discuss this results aspect of the coaching with the person?

9. During my interactive coaching conversations, has the person agreed to get started working toward the recommended change?

10. Is this a small enough behavioral change that we could see results immediately, or should I plan for repeated observation and feedback as the person moves closer toward the goal?

THE COACH APPROACH
QUESTIONS COACHES ASK THEMSELVES

Plan to Succeed: Become The Coach You Want to Be

1. What did you learn so far today that you want to apply right now?
2. Name 1 or more people (initials only) who can or may eventually see you as "My Coach."
3. Coaching is a skill and skill development requires practice. What will you do to practice? List a few steps (in any order).

Guardian as Coach: Best Practices for Helping People Develop + Grow

Participant Guide

Final Wisdom

1. You are the vehicle, not the driver. You cannot take a person where that person does not want to go.
2. People who have never experienced a culture of coaching may resist coaching and never give in to the experience.
3. Trust can be earned. Earning the trust of your clients is part of being a successful guardian. Guardians should keep on working to build trust before attempting to help someone change a specific behavior or begin to build new skills.
4. Employees should be working to earn your trust while you work to earn theirs. If you are working harder to be trustworthy than the person is, you may have a difficult or impossible coaching task.
5. Start relationships off with sincere positive feedback that is concrete enough to show you are paying close attention. Even people who shy away from or fear being observed, can get comfortable when the results are genuinely pleasant and positive.
6. Practice giving sincere, concrete positive feedback and resist any urge to follow the feedback with "but."
7. It is easier to coach to something you have taught. You can refer back to visual aids or checklists. The person feels less surprised by the coaching because you made them aware in advance about expectations. Guardians can set the stage by giving clients a "guidelines card" <https://training.guardianshipcenter.org/catalog/info/id:267>. Employers can provide training, checklists, posters, infographics, job aids and other resources.
8. Corrective feedback is only given to help someone improve. It always begins with a concrete, well-described observation.
9. Feedback has power. Use it wisely and carefully.
10. Great coaches create small wins that add up to success. Be patient, kind and persistent.