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**Mentor Coaching Guidebook**

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# CALENDAR VIEW AND PARTICIPANT SIGN UP PROCEDURE

## Participant Sign-up Procedure

1. CCI participants have two choices when signing up: as a Coach, and as Listener. The student can chose to designate their coaching session as being a Practical Skills Assessment if they have completed previously three practice coaching session.
2. The system only allows for a maximum of two coaches to sign up as a Coach. Once two coaches are signed up, the system will allow for Listeners to sign up.
3. An unlimited number of Listeners may sign up.
   1. You do not have to wait for Listeners to get on the session.
   2. Ask for Listener involvement only if there are 1 or 2 Listening; in that case, you can ask them if they would like to participate as a Coachee.
   3. If you just have one person signed up to coach, you can ask the Listener if they would like to be the Coachee or even practice as the Coach.
   4. If the Listener does end up practicing as a Coach, please ask whether they want that to count as an official Practice Coaching session. It does NOT have to! If there is time, and the person wants to just “test” out coaching a bit, he/she can without it ‘counting’ as one of the 3 required practice sessions.

## Calendar View

1. As a mentor coach, you may view the participants who are signed up for the sessions. This will allow you to see emails of the participants, as well as see how “full” your session is.
2. Whenever there is at least one participant signed up for a session, an asterisk shows after the time on the session box.
3. When there are two participants signed up to Coach, the calendar session will be a purple color.
4. When there is one participant signed up to Coach, the calendar session will be green.
5. If the participant registered the session as their final PSA, you will note “PSA” next to their email within the session box.
6. Listeners can NOT sign up to Listen UNTIL there are TWO participants signed up to Coach.

LOGGING IN TO GOTOMEETING OR GOTOWEBINAR

1. Log in to Brad’s account either at [www.gotomeeting.com](http://www.gotomeeting.com) or [www.gotowebinar.com](http://www.gotowebinar.com).
2. Select “Sign In” in the upper right.
3. Email: [bcooper@uscorporatewellness.com](mailto:bcooper@uscorporatewellness.com)

Password: danielle1

1. Note that if you log-in to GoToWebinar, you will click on the person icon in the upper right, scroll to GoToMeeting and click that to get to GoToMeeting.
2. Locate your session and select Start.
3. In the middle of the control box, you will see the call-in phone number, access code and audio pin. (If you are using your computer microphone system then follow those instructions)
4. Press \*1 to begin the broadcast. That will allow you to speak to the other participants.
5. Do NOT select “show my screen” as this is an audio only session.
6. Everyone will show up for the session unmuted, so it is up to you to mute any listeners and also verbally tell listeners to mute themselves. Select the plus sign next to the word “Attendees”. This will expand that pane. Next to each participant you will see a green phone or mic. Click on that icon for the 2 participants to be sure they are not muted.
7. Leave all other participants on mute.
8. Because this session is 1 ½ hours and because you are not using the screen, at least every 30 minutes, just be sure you move the mouse or click the mouse somewhere on the screen. That alerts the system that you are still there, so it doesn’t time out.
9. When your session is complete, simply select the X in the upper right-hand corner and select to end the webinar for everyone.

TROUBLE-SHOOTING GOTOMEETING

1. On occasion, the system MAY ask for authentication. You will get a message saying an “authentication code” will be sent to [bcooper@uscorporatewellness.com](mailto:bcooper@uscorporatewellness.com). If this happens, text Brad at 303-521-1570, and have him authenticate. Hopefully this will NOT happen as Brad has let GoToMeeting know this does not work well for us.
2. If you lose a participant, hopefully they will just call back in or text me for help. Susan: 303-519-1361. Suzanna: 720-339-4292.
3. Tami Duncan will always connect you ahead of time (about 48 hours of advanced notice) with the participants via email. This email mentions who is signed up and as what role – see example below. You can send an email if you’d like so participants realize they do have your contact information; this is not mandatory though. (Tami Duncan will also let you know 48 hours in advance if a session has no participants; and will remove the session at that time)
4. There are 2 ways you can help someone get back on the system.
   1. If the meeting is still in process, you can select “invite people” or the icon that looks like a person with a plus sign. It will allow you to email call in instructions.
   2. If the meeting ended, you may start a new meeting and invite participants.
      1. Select Meet Now at the top of the page
      2. Invite people – either select the email option, copy/paste the instructions to the group via email or connect on the phone with a participant and tell them the instructions.
      3. This is a really easy option so don’t be worried about trying it. Very quick!

## STARTING THE SESSION

The following is meant to be a GUIDE, not a script.

1. “Welcome to the coaching session. My name is \_\_\_\_\_\_ and I \_\_\_\_\_\_\_.” (Just share a bit about yourself!)
2. “If you have any technical issues during the session, the best first step is to exit GoTomeeting and begin the log in process again. If you still have problems, call or text \_\_\_\_\_\_\_\_\_ for assistance.”
3. **“When you are a listener, please mute yourself on your phone so we don’t hear background noise.”** (If you hear background noise during the call, take the time to interrupt the session and remind people to mute themselves. You can also mute participants if they show up on your screen by selecting the green phone or microphone next to their name. However, if a person calls in and does not click through the computer link then they will not show up for you to view).
4. Ask the participants if they are coaching today as a practice session or as their final coaching practicum. Determine which practice session this is, as that will impact the type of feedback you will give. I also try to give a heads-up on this in the email I send regarding the session. More on this in the **FEEDBACK** section of the guide.
5. Remind the participants that the coaching sessions are a safe place to practice new skills and learn from the experience. The environment is meant to be encouraging.
6. Before each individual begins to practice as a coach, ask each student, “Is there a group of skills or skill from the PSA that you want to focus on?”
7. Provide expectations, “Before we get started, let me explain what you can expect during the session:
   1. Each of you will coach the other for a 20-minute session if it is a practice session; up to 30 minutes are allowed if this is a student’s oral practicum. Then we will get the chance to talk about the session and I will provide you with some feedback.
   2. Please know that I will be providing you with some feedback or suggestions of other things you might want to try, and that I might interrupt in the session, so you can practice it in real time before moving on to another part of the coaching session. The value of these sessions is really in both the practice and the feedback to give you other ideas to think about and try in the future.
   3. When you are being coached, please share something real that is going on in your life that you feel is appropriate in this setting. We do have some anonymity in conducting these sessions over the phone and only using first names, but just be aware of the fact that there might be some other coaching students listening in as a practice session as well. The listeners will stay muted the entire time. Also remember coaching session discussions should be kept confidential.
   4. When you are coaching, I am listening for some of the basic Motivational Interviewing skills. Things like using reflections, open ended questions, affirmations, summaries. I’m also listening for how you help your client focus, how you share your ideas, and how you set goals. As a reminder, this is practice! And it is okay if it is a bit clunky as you test out new skills during your practice sessions. That is what the practice sessions are for.
   5. Also, all of the feedback will be given verbally on the phone during this session, unless this is your PSA. After completing your PSA, you will receive an email within 48-72 hours.
   6. What questions do you have for me?”
8. “Who would like to coach first?”
   1. For those of you doing this as your coaching practicum, please begin with your intro: mention confidentiality, topics that can be discussed or whatever information you plan to use at a first session. If this is a practice session, you can choose to set this up like it is an initial coaching session if you would like to practice your introduction or you can just begin with a basic question and get right into the coaching.
   2. Remember the ruler is a skill that will be graded on during the practicum, so it is up to you whether you want to practice this in a practice session.
   3. Practice sessions should run about 20 minutes. If this is your oral practicum, you are allowed to coach for 30 minutes, and 20 minutes should be a minimum.

PROVIDING FEEDBACK

Have the Practical Skills Assessment (PSA) rubric on hand for all mentor coaching sessions now even during practice sessions, as it will help with providing feedback that uses consistent wording.

**During all sessions:**

1. Note coaching strengths and opportunities to improve.
   1. “Star” questions or reflections that were impactful so you can provide specific feedback.
   2. Perhaps put in parentheses statements or questions that you think could have been helpful to add or say.
2. During practice sessions, **be prepared to interrupt in-session** to provided needed feedback and redirection in real time. For example, if the student moves to goal setting in first 5-10 minutes, interrupt and encourage more discussion to evoke change talk. Another example is to interrupt if you hear the coach being too directive: stop and note what you are hearing and provide different ways to coach the coachee. Note when giving this type of feedback, it is important to focus on the coaching behavior versus the student (“It seems like there is a lot of directing versus guiding. Perhaps try leaning more on asking the client for her thoughts.”)
3. Watch the time. If they are not winding down at the 20- minute mark, it is okay to step in and say it looks like the time is about up. How about if you do a final statement or summary. (Going over a few minutes is okay, as is ending at around 15 minutes).
4. After the coaching, **FIRST ask the coach how it felt to be a coach**. Give the person time to share how it felt and use your reflections to listen and interpret. This is often a great entry into what you are wanting to share anyway. I have found that most people pick up on the same thing I am about to say! It comes across much softer when you are just agreeing with what they felt.
5. **Provide feedback that is based on whether it is a first, second or third session (see below).**
6. If you have time, it is also nice to ask the person who was coached to voice his/her feedback.
7. “Great. Now it is time for us to switch coaches. \_\_\_ it is now \_\_\_ time so I will put myself on mute. You are now in charge!”
8. Email Susan ([smcgarry@uscorporatewellness.com](mailto:smcgarry@uscorporatewellness.com)) notes on the session (described below) and session attendance.

**Feedback Based on Session Number**

For a Coach’s **First Coaching Session**:

* 1. Be prepared to give more general feedback. Think “Strengths and Opportunities”
  2. Ask the student BEFORE giving feedback how he/she felt about his/her coaching. Student often will mention areas of biggest opportunity. (Reflect, ask open-ended questions around that topic – use spirit of MI)
  3. Affirm strengths, e.g., showed empathy and engagement, good reflections, powerful open-ended questions
  4. Mention 1 or 2 things for them to work on that are the PRIORITY opportunities. It might be general themes like – it sounded like you were sometimes asking leading questions. When you said, “Have you thought about trying \_\_\_”, you could have instead said – “What have you thought of trying?” Other common issues are difficulty focusing the session, choosing the direction of the session instead of asking the client to choose where to start, giving advice, pushing too hard to set a specific goal, etc.
  5. Follow up your ideas with a question. For example: “ After hearing my feedback, what are you thinking?”
  6. Remind students to refer to the PSA between sessions.
  7. **Email Susan within 24 hours and provide Strengths and Opportunities for each student.**

1. For a Coach’s **Second Coaching session**:
   1. Ask for coach to share his/her thoughts on session first.
   2. Affirm coaching strengths
   3. Identify and communicate biggest priority “coaching opportunity”
   4. Be prepared to discuss opportunities in multiple areas
   5. If there are more than 3-4 areas of opportunity, provide details of the opportunities in the email to Susan, so feedback can be passed on to the student.
   6. Always ask for student’s thoughts after offering feedback
   7. Email Susan within 24 hours with details on student strengths and opportunities
2. For a Coach’s **Third Coaching Session**
   1. Ask for coach to share his/her thoughts on session first.
   2. Affirm coaching strengths.
   3. Listen with the question in your head, “Is this person ready for the practicum (PSA)?”
   4. Mentor coaches need to be very clear on "coaching opportunities" or elements that MUST be addressed before the student attempts the final practicum; this should be communicated verbally by the mentor coach in the session to the student.  MC also needs to communicate details to me in the written feedback, as well as let me know if I should recommend to the student another practice session before the PSA.
   5. If you believe more practice is needed by the student before his/her PSA, give your feedback, and offer the suggestion of practicing with friends, family, coworkers before the oral practicum.
   6. **Email Susan within 24 hours and provide Strengths and Opportunities for each student. If you think the student needs another formal CCI practice coaching session before his/her PSA, tell Susan, and she can then email the client to offer another formal CCI practice coaching session.**
3. For a Coach’s Oral Practicum (**Practical Skills Assessment**):
   1. Interrupting the session is not recommended.
   2. After the coach is done coaching, ask for his/her thoughts first.
   3. Affirm coaching strengths.
   4. Identify and discuss coaching opportunities. Be specific. Ask student for thoughts on your feedback.
   5. Use the PSA rubric and score accordingly. Provide notes on rubric if scoring 3 or below. Write knowing student may read the feedback.
   6. Let the coach know that they will receive an email within 48 hours with details of whether or not they passed.
   7. Send the completed rubric to Susan with your feedback within 24 hours when you confirm participation by coaches and listeners.
   8. The Practical Skills Assessment will be recorded. See instructions below.

RECORDING THE PRACTICAL SKILLS ASSESSMENT

As a Mentor Coach you will:

1. Monitor for Students who you will be working with who will be doing their Final Practicum
2. State at the beginning of the coaching session that the PSA will be recorded.
   1. The PSA will always be completed first, then the regular practice coaching session.
   2. If there are two PSA’s, you will ask the student to choose who will go first.
   3. You will only record the PSA coaching session. You will not include conversation/feedback.
3. Press record before the coach begins their PSA and immediately after it ends (see instructions below)
4. ONLY the PSA will be recorded.
   1. You will not record practice coaching sessions 1, 2, or 3. You will not record verbal feedback or discussion before or after the PSA. You will ONLY record the coach and client PSA session.
5. To begin recording, you will see a box at the top left of the screen with REC in it, click on that box and it will ask you to click on a box that says start recording. You will hear an announcement that says, “This conference will now be recorded.” When the PSA session is over, you will click on the REC box again and you will hear an announcement that says, “This conference will no longer be recorded.”
6. I will retrieve the recording through GotoMtg for internal purposes only.

AFTER COACHING IS COMPLETE

1. After all coaching has been done by students, it is time for the “next steps”.
   1. **Please email Susan (**[**smcgarry@uscorporatewellness.com**](mailto:smcgarry@uscorporatewellness.com)**) within 24 hours of completing the session with feedback so we can mark the accounts as complete**. See above details on procedures for practice sessions vs PSA.
   2. Let the participants know that their profile will be updated within 48 hours of the session. If they haven’t seen it updated by then, they can email Susan ([smcgarry@uscorporatewellness.com](mailto:smcgarry@uscorporatewellness.com))
2. The session is set for 1 ½ hours. If you finish before that time, you are welcome to answer any other questions or just end early.
3. Sometimes there will only be 1 person signed up for the session. When this is the case, the person will be coaching you. This scenario takes a little more brain power on your part as you have to be yourself in the conversation being coached while also listening for their coaching skills. Write down some things down as you go – just as suggested above. For your feedback, you are also in a good position to let them know how you felt being coached. Specific things you appreciated or any feelings of frustration, confusion, etc. during the session. After discussing the feedback with the person, ask them how they would like to use the rest of the time. The individual might choose to just ask you questions about coaching and your experiences or they might appreciate the opportunity to be coached. If you end up coaching the individual, I would spend a few minutes after the session getting their thoughts on how it felt. You might also include any of your own internal dialogue that was happening during the session or some insight into why you asked specific questions.

VERBIAGE OF EMAIL SENT WITH DETAILS OF THE UPCOMING COACHING SESSION

Hello!

Thanks for signing up for the CCI wellness coaching session scheduled for      **Mountain time**! Please note that this session is audio only😊

**Remember, if you have to cancel or reschedule your session, please let me and the Mentor Coach know via email, as well as remove yourself from the Calendar**. As a courtesy to the Mentor Coach and other participants, if you need to cancel your scheduled appointment, please provide at least 24 hours in advance. Missed unexcused sessions may result in a fee.

  will be your mentor coach.   will be coaching.   is signed up as a listener. As a listener, you may be asked to be a coachee since there is only one student signed up to coach. This allows the Mentor to give full attention to the coach and session. And the listener is welcome to practice as a coach if desired  - that is entirely up to the listener.

 When you meet with your mentor coach, please let the coach know which Practice Session this is for you if you are coaching. The feedback the coach provides for you is based on which session you are doing: Practice Coaching Session 1, Practice Coaching Session 2, Practice Coaching Session 3, or the Final Practicum.  I believe this is    1st practice session. Please confirm with your coach if this is correct.

Each person signed up to coach will do so for a 20–30-minute coaching session. Your mentor coach will be listening for you to use your MI skills such as open-ended questions, affirmations, reflections and summaries. Your coach will also be listening for how you engage with your client, focus the session, evoke change talk and plan with SMART goals.

 The Practical Skills Assessment (PSA) rubric is attached to this email. Practicing coaches may find it helpful to review before and after the session.

* **Reminders regarding the Final Practicum**:

` **Your Final Practicum session will be recorded**to comply with the NBHWC eligibility requirements.

` You will do your coaching session first to make the recording process easier. Only your PSA will be recorded; any conversation or feedback before or after the session will not be recorded.

` It is required to include your introduction: brief description of your background, confidentiality and explanation of potential Big Picture Wellness topics. This is optional during practice sessions. Note that the script is also attached to this email.

` In addition, use of the Ruler (or scaling) is also a skill that is required during the final practicum; while this is also optional during practice, you may find it helpful to practice during practice sessions.

` 30 minutes are allowed for the final practicum; the session should be a minimum of 20.

When you are the person being coached, please think of a topic in the broad scope of wellness that is real in your life and appropriate to share in this setting.

After the coaching session, let the Mentor Coach know how you would like to use the time. If there is extra time, it can always be used for more practice; perhaps the listener may want to practice.  You may also use the time to ask the Mentor Coach questions about wellness coaching.

 If you have any difficulty joining the session, just come back to this email to communicate directly with your mentor coach.  If joining through the computer is not working, you may just call in directly with the number listed below as you do not have to click into GoToMeeting through the below link. If you need further assistance, contact Susan McGarry at 303-519-1361, and if she is available, she will respond with help.

**Sign in details:**