

Catalyst Coaching Institute Practical Skills Assessment (PSA) Rubric

Student:

Mentor:

Date:



20 Skills: 70 points or higher is passing

TOTAL SCORE: 0

Coaching Session Structure	Proficient 4-5 points	Developing 2-3 points	Emerging 0-1 points	Score
Introduction	Includes: -Delivery sounds natural and not scripted -Big Picture Wellness -Confidentiality -Expectations -Asks for client's thoughts -Transitions conversation with Open-Ended Questions or Visioning Includes at least 5 items	Includes: -Delivery sounds natural and not scripted -Big Picture Wellness -Confidentiality -Expectations -Asks for client's thoughts -Transitions conversation with Open-Ended Questions or Visioning Includes at least 3 items	Includes: -Delivery sounds natural and not scripted -Big Picture Wellness -Confidentiality -Expectations -Asks for client's thoughts -Transitions conversation with Open-Ended Questions or Visioning Includes <i>less than</i> 3 items	
Wrap Up	Affirms the client's efforts done in the session. Assists client in articulating learning and insights gained in the change process. Allows the client to summarize takeaways and goals. (Ideal) or Uses a summary and asks for client confirmation.	Tells the client what the goals are and doesn't ask for confirmation. Uses a summary and doesn't ask for client confirmation.	Seems stuck as to how to end the coaching session. Offers advice or responses that are unrelated to client learnings or insights. Does not inquire about client takeaways.	
Time Management	Spends more time evoking motivation and change talk compared to goal setting. Allows space for the client to direct the session. Supports the client to achieve the identified objective of the session. Completes the session in 20-30 minutes.	Spends equal time discussing the WHY and the HOW. Does not manage time efficiently leaving the client with partial objectives met. Completes the session in less than 20 minutes.	Spends the majority of time on goal setting. Does not achieve client's stated objectives for the session. Completes the session in less than 15 minutes or more than 30 minutes.	
Coach/Client Connection/Alliance	Proficient 4-5 points	Developing 2-3 points	Emerging 0-1 points	Score
Client Centered Process	Encourages and supports the client to set priorities and agenda throughout conversation. Elicits from the client why the area of focus is important to them. Demonstrates understanding of the client's meaning (both stated and unstated) and incorporates this understanding into the direction of the coaching session.	Allows the client to set priorities and agenda with occasional direction. Briefly questions why the area of focus is important to the client. Coach sometimes misses acknowledging important keywords and phrases communicated by the client.	Directs the agenda through the coaching session. Does not encourage or support the client's agenda. Does not elicit from the client why the area of focus is important. Does not demonstrate an understanding of the client's meaning.	

<p>Empathy & Rapport</p>	<p>Acknowledges and reflects client's thoughts, perspectives, feelings, or emotional state with empathetic, nonjudgmental, supportive comments.</p> <p>Demonstrates respect and unconditional positive regard.</p> <p>Offers reflective and affirming statements using client's language and matching energy to demonstrate understanding.</p> <p>Responses reflect curiosity.</p> <p>Acknowledges and reflects emotions which moves the conversation forward.</p>	<p>Makes a comment inappropriately or insensitively.</p> <p>Responses are inconsistent ranging from curious to clinical.</p> <p>Acknowledges emotions but allows those emotions to cause the conversation to lose focus.</p>	<p>Shows frustration and judgement in the client's decision making.</p> <p>Does not acknowledge client's thoughts, perspectives, emotions, or state.</p> <p>Demonstrates disrespect or judgement towards the client.</p> <p>Does not offer reflective or affirming statements or match client's energy.</p> <p>Missed opportunity to explore or question the underlying meaning in client's statements.</p>	
<p>Mindful Presence</p>	<p>Present and focused on best coaching practices during 90-100% of the conversation demonstrating regulation of own emotions.</p> <p>Is comfortable with silence.</p> <p>Allows the client to do most of the talking.</p> <p>Uses silence and pauses to stay attuned to the client's emotional state.</p> <p>No external or internal distractions</p>	<p>Present, but focused on performance of coaching or own emotions.</p> <p>Talks 50% of the time.</p> <p>Tendency to sometimes rush to the next question without allowing a pause for thinking.</p> <p>Some external or internal distractions such as reading notes, background noise, or interruptions.</p>	<p>Presents as distracted, nervous or agitated at any time during the session.</p> <p>Does most of the talking.</p> <p>Does not allow for pauses or silence.</p> <p>Does not regulate own emotional state; demonstrates negative emotional responses in session.</p>	
<p>Motivational Interviewing</p>	<p>Proficient 4-5 points</p>	<p>Developing 2-3 points</p>	<p>Emerging 0-1 points</p>	<p>Score</p>
<p>Facilitating Client Discovery</p>	<p>Asks questions that draw out client needs, feelings, and interests causing a deeper level of engagement.</p> <p>Explores setbacks with the client and positively reframes setbacks as learning opportunities.</p>	<p>Equal number of open-ended and information gathering questions.</p> <p>Notes setbacks but misses opportunity to reframe or learn from the setbacks.</p>	<p>Does not ask questions that draw out the client's needs, feelings, and interests.</p> <p>Does not explore setbacks with the client when appropriate.</p>	
<p>Open-Ended Questions</p>	<p>Asks open-ended questions with curiosity to evoke a deeper level of reflection.</p> <p>Asks more WHAT and HOW questions; minimizes questions starting with "WHY".</p> <p>Shifts inquiries (questioning) as needed to respect client boundaries.</p>	<p>Asks open-ended questions that occasionally include answer options or information-gathering, when a deeper more reflective question is appropriate.</p> <p>Occasionally asks questions unrelated to the topic when the client does not indicate that they want to share.</p>	<p>Asks closed questions over 50% of the time.</p> <p>Asks questions that reveal the bias of the coach.</p> <p>Asks questions that demonstrate that the coach is not in tune with or respecting client's boundaries.</p>	

<p>Active Listening</p>	<p>Uses simple and higher-level listening statements/reflections to encourage insightful discovery.</p> <p>Uses more listening statements/reflections than questions.</p> <p>Listening statements/reflections are mostly congruent with the client's meaning.</p>	<p>Uses simple and higher-level listening statements/reflections to move the conversation forward.</p> <p>Listening statement/reflection to open-ended question ratio is 1:1.</p> <p>Listening statements/reflections are sometimes congruent with the client's meaning.</p>	<p>Listening statements/reflections do not demonstrate that the coach is listening to underlying concerns and unspoken issues.</p> <p>Uses only simple listening statements/reflections.</p>	
<p>Maximizing Change Talk</p>	<p>Uses summaries to reflect insights and change talk appropriately throughout the conversation.</p> <p>Consistently elicits, identifies and reinforces preparatory change talk (DARN: Desires, Abilities, Reasons, and Needs to change) through MI skills.</p> <p>Demonstrates authentic curiosity in exploring the client's motivation for change.</p> <p>Uses a ruler or a scaling question to explore change talk, leading with the lower number first, then the higher number. Example: "Why are you a 6 and not a 4?" Reflect, then ask "What would it take for you to go from a 6 to a 7 or 8?"</p>	<p>Uses a summary at the end of the conversation before goal setting.</p> <p>Occasionally elicits, identifies, and reinforces preparatory change talk.</p> <p>Occasionally offers solutions or advice rather than exploring change talk.</p> <p>Overuses summaries throughout the conversation resulting in the coach dominating the conversation.</p> <p>Listening statements/reflections, questions, and summaries following a ruler or a scaling question highlight <i>sustain</i> talk Example: "Why are you a 6 and not a 9?"</p>	<p>Does not use summaries.</p> <p>Does not elicit, identify, or reinforce preparatory change talk.</p> <p>Offers solutions and advice and does not recognize the client's preparatory change talk.</p> <p>Does not use a ruler or a scaling question when there was an opportunity to in eliciting change talk.</p>	
<p>Information Sharing & Scope of Practice</p>	<p>Asks permission, shares information and ideas that are congruent with the client's goals and asks for client's thoughts.</p> <p>Asks the client about prior knowledge before sharing.</p> <p>Recognizes and identifies red flags in emotional functioning that may need a mental health or physical health consult as appropriate.</p> <p>Stays within HWC scope of practice when information sharing offering resources from nationally recognized authorities.</p> <p>Note: If a coach does not share or does not have an opportunity to share and is within the scope of practice, the coach is given 5 points.</p>	<p>Asks permission, shares information and ideas that are not congruent with the client's goals; and/or does not ask for the client's thoughts.</p> <p>Asks for permission then shares a specific solution.</p> <p>Asks permission to share, but offers resources or information that is not nationally recognized, is biased, or creates a conflict of interest.</p>	<p>Shares information and ideas without permission.</p> <p>Does not ask clients about prior knowledge before sharing information.</p> <p>Overlooks or ignores red flags in emotional functioning and crosses the line of HWC scope of practice by attempting to address the mental health needs of the client.</p> <p>Offers information out of the HWC scope of practice.</p>	

Uses Affirmations	Consistently highlights the client's strengths and successes to build confidence in taking on challenges.	Occasionally acknowledges the client's successes in an authentic and timely manner.	Does not acknowledge the client's successes. Focuses on the problem versus strengths and successes.	
Minimizing Sustain Talk	Reflects sustain talk only to build empathy and develop rapport; does not reinforce it. Recognizes when sustain talk is generated and shifts the conversation. Acknowledges discord while avoiding the Righting Reflex.	Occasionally reflects sustain talk other than for building empathy and rapport. Occasionally recognizes sustain talk and sometimes shifts the conversation. Occasionally takes a "you should" stance to fix client perception which results in greater discord or resistance.	Reflects sustain talk beyond what is needed to share empathy. Seems unaware of sustain talk and unable to shift the conversation when needed. Takes a "you should" stance or tries to fix client perception in a way that elicits greater discord or resistance.	
Expanding the Conversation & Creating Generative Moments	Proficient 4-5 points	Developing 2-3 points	Emerging 0-1 points	Score
Discusses Strengths, Values & Beliefs	Offers reflective statements, questions, and summaries that support discussion on how the client's values, beliefs, and strengths can help achieve goal. Affirms what is important to the client and uses it to create a client centered goal.	Acknowledges the client's values and beliefs based on the conversation but does not explore any discrepancies in action. Does not use values and strengths to move the conversation forward.	Does not explore or acknowledge the client's strengths, values, or beliefs.	
Exploring Possibility	Invites the client to explore a broader perspective, expanding awareness beyond the immediate situation or goal. Offers different visual tools or cognitive exercises to explore and envision new possibilities and create generative moments.	Occasionally asks questions that demonstrate a client's limiting beliefs, but does not support exploration of a broader perspective Offers a visual tool or cognitive exercise but misses the opportunity to indicate learnings from its use.	Does not engage with the client in exploring a broader perspective when needed. Misses opportunity to offer different visual tools or cognitive exercises to explore and envision new possibilities.	
Elicits Past Knowledge & Experience	Invites the client to share prior knowledge and experiences and reflects why important. Affirms past successes.	Invites the client to share prior knowledge and experiences but does not use it to move the conversation forward.	Does not invite the client to share prior knowledge or past experiences. Does not affirm past successes.	

Goals and Implementing Action	Proficient 4-5 points	Developing 2-3 points	Emerging 0-1 points	Score
Goal Setting	<p>Supports and affirms the client's short-term SMART goals that fit client's learning style, pace, and stage of change.</p> <p>Asks the client to define success in terms of progress towards goal completion.</p> <p>Approaches goal setting with an "experimental" mindset.</p> <p>Reminds the client that the goal is an experiment from which they can learn. (May use words "test" or "try").</p>	<p>Facilitates the client's creation of short-term SMART goals.</p> <p>Does not encourage the client to break down complex goals into smaller steps when appropriate.</p> <p>Mentions goal setting with an "experimental" mindset but does not explain the concept.</p>	<p>Suggests the client's short-term SMART goals in a directive manner.</p> <p>Does not partner with the client to create clear actionable goals or next steps.</p> <p>Does not inquire or help the client define what success looks like.</p> <p>Does not approach goal setting with an "experimental" mindset but is focused on the "shoulds".</p>	
Visioning (Initial Session)	<p>When appropriate, asks questions that assess a client's readiness to explore a health and well-being vision and explains the visioning process.</p> <p>Co-creates with client a vision that honors the client's preferences, values, and goals.</p> <p>Invites client to summarize and state the vision as well as talk about the meaning it holds; tracks the client's insights and thoughts about their vision of optimal health.</p>	<p>Briefly mentions visioning as a process but does not follow through with engaging client in stating a vision or creating a vision.</p>	<p>Does not explore a client's readiness to create a health and wellbeing vision.</p> <p>Does not work collaboratively with the client to create a vision of optimal health and well-being.</p> <p>Does not invite the client to summarize and state the vision or to share the meaning it holds.</p>	
Progress Monitoring	<p>Asks client how they would like to be accountable for goals and supports client in selecting specific accountability methods.</p> <p>Asks how the client intends to celebrate accomplishments and successes.</p>	<p>Mentions accountability and directs the client towards a method.</p> <p>Asks how the client intends to celebrate successes but overlooks a discussion on accountability methods.</p>	<p>Does not support a client-directed development of an accountability plan.</p> <p>Does not ask how the client intends to celebrate accomplishments and successes.</p>	
Supportive Environment & Potential Challenges	<p>Explores with the client about accountability, potential challenges, and support in goal achievement.</p> <p>Explores ambivalence to change.</p>	<p>Asks the client about accountability, potential challenges, or support in goal achievement.</p> <p>Does not explore ambivalence or hesitancy.</p>	<p>Does not discuss accountability or potential challenges and support in goal achievement.</p> <p>Does not explore ambivalence to change.</p>	