



Call #6 Notes:

Designing Actions, Planning and Goal Setting, Managing Progress and Accountability

Pre-work

All documents are housed at [http:// presencebasedcoaching.com/students/lipcc-program-materials/](http://presencebasedcoaching.com/students/lipcc-program-materials/). Before our call, please:

- Print out and review this PDF for the call
- Review the specific sections of the *PCC Exam Standards* on Designing Actions, Planning and Goal Setting, and Managing Progress and Accountability
- Review the sections of the *PBC Competency Model* on Designing Actions, Planning and Goal Setting, and Managing Progress and Accountability
- Note any pressing questions or areas of confusion
- Take the self-assessment below

Commentary

These three competencies relate to the fieldwork aspect of coaching, and to the overall direction and purposefulness of coaching. They point to what makes coaching a unique form of helping, and are central to making coaching a highly effective technology for creating sustainable change.

Competency #9: Designing Actions (Guide)

ICF Language: Ability to create with the client opportunities for ongoing learning, during coaching and in work/life situations, and for taking new actions that will most effectively lead to agreed-upon coaching results.

Presence-Based Coaching Language (LIPCC/PCC Level:) Coach explicitly engages client in joint design, and holds action possibilities lightly. The coach includes the client's overall development as relevant context for designing actions, which address both project and curriculum levels of learning. Some actions and practices are ontological in nature, and will likely have implications for areas of the client's life beyond specific commitments.

- a. Identifies, jointly, fieldwork in multiple domains of learning, relevant to client commitment
- b. Designs self-observations and/or somatic practices around habits and/or new behaviors

- c. Asks client to experiment with a new behavior within the coaching session
- d. Tracks how considering certain actions affects client's present moment experience
- e. Designs actions with client that address both project and/or curriculum levels of learning
- f. Designs actions with client at an appropriate level of "stretchiness"

Commentary

Designing Actions starts with the coach's ability to partner with the client around co-creating field work to be done in between coaching sessions. Suggestions for possible fieldwork activities come from the client primarily, with the coach adding in from her experience and expertise as needed. These actions are a way of observing, learning and practicing new behaviors that support the client's coaching goals.

Actions must be seen by the client as relevant and appropriate to the coaching goals. Fieldwork design should consider multiple domains of the client's life (e.g., Action Matrix) and learning style, and should be realistic, given the overall ecology of his life. Fieldwork is customized to meet the client where he is and offer a suitable "stretch."

Competency #10: Planning and Goal Setting (Partner, Guide)

ICF Language: Ability to develop and maintain an effective coaching plan with the client.

Presence-Based Coaching Language (LIPCC/PCC Level:) Coach engages in a broader level of conversation, jointly developing plans and goals that incorporate a developmental perspective beyond the client's declared commitments.

- a. Uses an explicit structure (IDP) to articulate linkages between actions and commitment
- b. Helps the client identify specific competencies to develop that address project and/or curriculum levels of learning
- c. Supports client in developing clear descriptions of future outcomes and goals
- d. Develops commitment to outcomes/actions that create new "facts on the ground"

Commentary

We use an Individual Development Plan as a structure to clarify the client's desired outcomes for coaching, and to specify agreements about fieldwork while explicitly linking them to the coaching outcomes. The IDP structure includes an overall commitment, observable competency-based outcomes, and fieldwork organized by domain in an Action Matrix with timelines. This coaching plan is a living document, and can be adjusted to meet the changing needs of the client in relation to his original coaching goals. This coaching plan reflects the overall orientation and purposefulness of the coaching process; progress is assessed along the way and at completion of the coaching engagement.

Competency #11: Managing Progress and Accountability (Contractor, Partner)

ICF Language: Ability to hold attention on what is important for the client, and to leave responsibility with the client to take action

Presence-Based Coaching Language (LIPCC/PCC Level:) Coach jointly designs systems for accountability. Coach follows up with agreed upon action steps, celebrating success and using breakdowns as an opening into emergent coaching content. Coach balances commitment and attention to outcomes with a willingness to jointly refine both outcomes and process with the client.

- a. Creates clear and specific agreements about what actions client will take following session; uses SMART criteria for actions
- b. Tests for fit and commitment around action steps
- c. Supports the client to define and measure progress at both Project and Curriculum levels
- d. Follows up with client about actions and learning since previous conversations
- e. Balances and integrates client's discovery and learning in the moment with broader coaching goals and outcomes
- f. Reveals and normalizes breakdowns; works with breakdowns as emergent coaching content

Commentary

Managing Progress and Accountability requires the coach to partner with the client to develop clear measures of success and accountability structures that support the client's coaching goals. These structures are related to the client's overall coaching goals, and serve the client's forward progress. The coach keeps her eye on this aspect of the coaching relationship, and is flexible yet firm in asking for and encouraging accountability from the client. This accountability around fieldwork and actions is critical to the success of coaching as a change technology.

Following up on fieldwork in the coaching session helps both client and coach celebrate successes, reframe breakdowns as learning opportunities, and work with the emergent agenda. The coach demonstrates rigor around accountability, and leaves the responsibility with the client to take actions in between sessions.

Self-Assessment

Please do a self-assessment, considering your coaching skills in relation to the competencies, as described above. Rate yourself, 1-5, against each of the detailed competencies. The ICF Summary is the ICF language for the overall competency; the italicized items are the specific PBC descriptions that evidence this competency at the PCC/LIPCC level.

Please use these ratings:

- 1 indicates that you do not use this competency well. (Perhaps because you are not familiar or comfortable with it. Or, you overuse it to the degree that it gets in the way.)
- 5 indicates a high level of proficiency in using the competency, and do not overuse it out of habit. You can move fluidly in and out of this as needed.

9: Designing Actions (Guide)		
Competency Detail	Rate	Your Comments
ICF Summary: Ability to create with the client opportunities for ongoing learning, during coaching and in work/life situations, and for taking new actions that will most effectively lead to agreed-upon coaching results		
a. Identifies, jointly, fieldwork in multiple domains of learning, relevant to client commitment		
b. Designs self-observations and/or somatic practices around habits and/or new behaviors		
c. Asks client to experiment with a new behavior within the coaching session		
d. Tracks how considering certain actions affects client's present moment experience		
e. Designs actions with client that address both project and/or curriculum levels of learning		
f. Designs actions with client at an appropriate level of "stretchiness"		

10: Planning and Goal Setting (Partner, Guide)		
Competency Detail	Rate	Your Comments

ICF Summary: Ability to develop and maintain an effective coaching plan with the client		
a. Uses an explicit structure (IDP) to articulate linkages between actions and commitment		
b. Helps the client identify specific competencies to develop that address project and/or curriculum levels of learning		
c. Supports client in developing clear descriptions of future outcomes and goals		
d. Develops commitment to outcomes/actions that create new "facts on the ground"		

<i>11: Managing Progress and Accountability (Contractor, Partner)</i>		
Competency Detail	Rate	Your Comments
ICF Summary: Ability to hold attention on what is important for the client, and to leave responsibility with the client to take action		
a. Creates clear and specific agreements about what actions client will take following session; uses SMART criteria for actions		
b. Tests for fit and commitment around action steps		
c. Supports the client to define and measure progress at both Project and Curriculum levels		
d. Follows up with client about actions and learning since previous conversations		

e. Balances and integrates client's discovery and learning in the moment with broader coaching goals and outcomes		
f. Reveals and normalizes breakdowns; works with breakdowns as emergent coaching content		

Application Notes, Fieldwork, or Commitments to Self