

# Chapter 3: Conducting a coaching session

Christine Thatcher, EdD; Melinda Sanders, MD; Mary Casey Jacob, PhD, ABPP

## Take home points

1. Meeting preparation ensures that time together is considered value added for both the student and the coach.
2. Students must have an active role in agenda setting.
3. Coaches provide guidance toward goal setting by exploring student interests and needs, as well as a regular check-in toward achieving these goals.
4. Coaches form a relationship with their students through building trust, open communication, and respect.

This chapter will assist preparation for effective coaching sessions by providing information on how to structure the session, document the session, provide feedback to the student, and describe creating an action plan. Successful coaching may serve to motivate and inspire the learner, as well as energize the coach through the process of forming this new relationship and observing the growth of the student.

## The coach's role

As stated in Chapter 2, being clear about the goals of coaching and being ready to develop a non-judgmental and student-focused relationship is key to successful coaching. Coaches serve as guides for students toward academic, professional, research or even personal goals. The role of coach is to open the conversation, to provide space for the student to think about self-improvement and direction, and to guide the student to learning about themselves and what they may be capable of. Active listening is a key component to successful coaching.

Preparation is an important factor for success for each meeting. There will be preparation for both the coach and the student. The coach should be aware of curricular pressures, such as the next examination period, time of year in the curriculum, and upcoming transitions, such as summer research, board prep, and the transition to the clerkships. The coach should also review notes from the last meeting and review any contract or action plan previously created and agreed to. The student should be prepared by contributing to the agenda, being reflective on their goals and progress toward those goals, and bring concerns or challenges to discuss.

## Vignette

*Dr. Frey has been invited to be a coach at his institution, provided documents describing his role, and attended a meeting of new coaches for orientation. He has received his list of students, and is wondering how to best approach his first meeting. He decides that it would make sense to just jump in and schedule a first meeting with one of his students. The meeting falls flat because he really doesn't understand the role of coaching and why he and the student have been paired together. The conversation was light and introductory, but both walked away wondering what the value of this relationship will be.*

## Thought questions:

1. What is the next step? How should Dr. Frey follow-up on this meeting?
2. How should Dr. Frey engage the learner?

The environment should be carefully considered for each coaching session. Part of the role of the coach is to provide a safe environment for each meeting. The space should be private enough for confidential conversations and free of distraction. The coach should also consider the language used. Starr describes collaborative coaching as a way for two people to create change together.<sup>1</sup> Often, a coach will use non-directive language to ask, probe, and increase the student's awareness of their own goals and how they learn best. At other times, directive language may be useful to provide advice, share experiences or impart information.

## Meeting preparation

A good start is essential to establishing a relationship that both the student and the coach will see as value-added. As described in Chapter 2, a coaching agreement or contract can help to break the ice, leading the initial discussion beyond how things are going. If done well, the contract lays out the expectations of the relationship, provides leading questions, an opportunity to discuss personal and professional boundaries, and can set goals and timelines for check-ins. If nothing else, it helps open the door to the conversation of why the coach and the learner have been placed into this relationship together.

**Knowledge of the curriculum:** Students will expect their coaches to have some knowledge of their curriculum and what is expected of them. It is important for the coaches to learn about the curriculum and expectations of the program and to be able to describe the developmental progress of the student through the curriculum. Coaches can start with reviewing what is required for each year through course descriptions and other materials that may be available, such as a course catalog. They can also review the graduation competencies to see where the student will

ultimately be at the end of the program. The more background information a coach reviews, the easier it will be when the student comes to discuss their progress.

### Goals and objectives of the coaching program:

Each institution will have programmatic goals, and it is important to understand where coaches fit into this vision. Will they assess students' progress directly, or indirectly? Will they help them to form goals toward the completion of projects or deadlines? Are they their advocate, and if so, what does that mean? How will they help them navigate toward their professional careers?

**Review of student progress:** Coaches may be asked to monitor academic performance as part of their role. Some programs may require they provide direct feedback to students from observations in a clinical setting. Once coaches have a general understanding of the scope of knowledge as a coach and what is expected of them, they can then gather the essential information before each meeting.

## Meeting structure

The next step in meeting preparation is to plan the appropriate structure. This section provides suggestions for the initial meeting as well as ongoing meetings with students.

**Initial meeting:** The coach has the responsibility to set the agenda for the initial meeting, as most incoming students have had no previous experience with academic coaching. Chapter 2 provides guidance including the use of a coaching contract, setting expectations, and clearly defining the parameters of the coaching relationship. This first meeting will set the tone for future meetings and provides opportunity for the coach and student to begin the conversation about goal setting. This time should be used to open the door to communication, getting to know each other, and begin building the trust that is so essential to a strong

relationship.

**Ongoing meetings:** The agenda for the ongoing meetings should be driven by the student. It is important for students to feel ownership of their own progress toward goals and a responsibility to the relationship. The types of sessions may vary as described below but the following elements should be included in each meeting:

- A review of the last session including goals
- An update on what has occurred since the last session
- Summary of the session
- Action plans toward short and long-term goals

## Meeting content

The goal of each meeting will vary with program, developmental progress, and the needs of the learner. These meetings may revolve around goal setting, reflection, planning, and individual needs. Each coach should decide on what will work in any given situation.

**Discovery and goal setting:** A student may want the opportunity to meet with a coach to explore a specific issue, such as developing a plan toward a research project or to prepare for boards. Or, the purpose may be much broader or long-range, such as becoming a successful intern and what that would require. Such a meeting would include:

- Discovering how the student tackled such a project in the past. What worked and what was problematic? How does the student feel about the project? Is the student ready to make a change? Discuss the student's comfort zone, and suggest ways for the student to move beyond this. Discuss persistence and strategies for success. Based on these

insights, an action plan may be implemented including SMART goals. SMART goals are Specific, Measurable, Achievable, Relevant, and Time-related.

- Action plan: A formal action plan provides structure and accountability. It may not always be necessary to develop a formal action plan, but this tool can be very useful in helping students attain both short and long-term goals. The action plan provides a structure for the student to develop steps toward completing a goal, a timeline, success measures, required resources, possible barriers to success, and a place to record final results. This is a tool for the coach and student to use to continuously revisit, check alignment. An example is provided in Appendix 2.
- Assuring the student has actively reflected on how these short-term achievements are part of a larger picture. It may be helpful to discuss smaller milestones, while keeping a larger, valuable aspiration as a motivating factor and ultimate goal.

**Academic progress:** At certain institutions, the academic coach follows their student's performance in their coursework with the opportunity to review interim grades, narrative evaluations from faculty, and in some cases peer evaluations. Preparation before this meeting is essential and will allow the conversation to focus on reflection and action steps toward improvement. During these sessions, the coach helps the student to reflect on areas to improve and explore areas of difficulty. The coach may also provide resource information to assist the student in moving toward improvement. The coach should also take advantage of opportunities to celebrate successes.

**Career planning:** Many schools use the AAMC's Careers in Medicine (CiM) Curriculum as the foundation for career planning. Often coaches will be asked to

discuss career goals. It is best to be prepared, but also know who to refer students to for more information. Career planning sessions should include the exploration of student interests, experiences, skills and attitudes paired with review of academic status if available. The CiM is useful in helping the student identify his or her strengths and weaknesses as related to specialties or practice settings, as well as exploring the types of experiences that are most exciting and rewarding. The coach may then help the student use those insights to set short-term goals and next steps which may expand his or her exposure to different fields or begin to focus on a specific specialty or pathway.

**Open-ended needs assessment session:** Such a meeting may occur at any point in the coaching relationship and may not be specifically directed to a specific project, an academic progress review or career planning. If initiated by the student, the coach might open with “What brought you in today?” If the meeting is a regularly scheduled session that is not devoted to any of the other topics, the coach might open with “What have we not covered?” Conversation starters should be open-ended and in the form of a question. Coaches should then spend the majority of the time actively listening. The key is to prompt self-reflection and to help the student learn from their experiences to move forward.

## Feedback

Being able to give useful feedback and being able to receive and process feedback are important skills, but not ones that come easily to some. One of the coach’s roles will be to help students develop these skills. An important place for coaches to start is to ask themselves or trusted colleagues if they are skilled at giving or receiving feedback. Depending on the responses received, coaches may want to start by seeking

mentoring from others in this area so that they can be role-models.

According to Wiggins,<sup>2</sup> effective and helpful feedback is:

<b>Goal-referenced</b>	Targeting outcomes the feedback recipient values or knows is necessary
<b>Tangible and transparent</b>	Behavioral and if possible, evidence-based
<b>Actionable</b>	Neutral facts that are goal-related allow the feedback recipient to have ideas about what to do differently
<b>User-friendly</b>	One or two points that are not overly technical and are developmentally appropriate given the student’s current skill level
<b>Timely</b>	Generally, the sooner feedback is given, the better. This might mean sometimes communicating with students between meetings. It is also a rationale for helping them become skilled at giving and receiving peer feedback which can occur in real time
<b>Ongoing</b>	Following up on how a student is progressing toward goal achievement and how feedback is being utilized (this also allows coaches to modify how to give feedback to a particular student, as they observe their own effectiveness)
<b>Consistent</b>	Peer coaches need to be on the same page about what students are expected to achieve

As a check on the effectiveness of the feedback, per Wiggins, the coach may ask “given this feedback, do you have some ideas about how to improve?”

When talking with students about peer to peer feedback, the coach may approach this conversation with a number of factors in mind. For example, it is important to know the goal of the feedback and what was asked. It is also helpful if both the evaluations written by the student as well as those written about the student are available.

**For peer evaluations written by the student:** It should also be clarified with the student what their intent was, and provide guidance on phrasing of feedback. Examples of effective feedback are a great way to approach improvement strategies.

**For peer evaluations about the student written by their peers:** The coach should help the student reflect on the message in this feedback. This is a great opportunity to discuss self-assessment, improvement, and reflection. Chapter 4 is a great resource to support guided self-assessment.

Students may talk with their coach about feeling overwhelmed with the amount of feedback they are asked to give about courses, faculty effectiveness and to peers. In some cases, this leads them to not complete evaluations (if not required) or to do them in a perfunctory way. The coach can help them develop skills of giving effective feedback and to see the importance of this life-long skill.

## Documentation

**Record keeping:** The institution will clarify for the coach what the record keeping responsibilities are and where those records should reside. The Family Educational Rights and Privacy Act<sup>3</sup> (FERPA) gives students over the age of 18 the right to review all material in their educational files. The coach may be tempted to keep private notes that the student does not have access to, but that is not wise for several reasons. If the coach is at a public institution, such notes are generally subject to Freedom of Information requests. More importantly, since one of the coach's roles is to help a student develop the skills of giving and receiving feedback, coaches must also be able to formulate their thoughts about a student's progress in a way that will assist them to grow and develop. Not keeping private notes forces the coach to provide thoughtful documentation that keeps in mind all the potential readers of that information.

Notwithstanding the caution against private notes, coaches may find it very useful to maintain a journal of sorts to note what occurred in meetings with the student and what they find when they access the student's academic records. Ideally, they would do so in an open way that allows them to show the student what they have noted so students will know what they will be providing formal documentation about. It is good practice to discuss what will be formally documented.

## What should be documented?

The agreement/contract you develop for the coaching relationship

Meetings with the students and the work completed in those meetings

Educational and professional goals the student identifies, and progress toward them

The coach's reviews of the student's educational portfolio

Feedback given to the student

Referrals made

## What should **not** be documented?

Opinions and judgments

Private information the student shares

### In review

After Dr. Frey's first meeting with one of his students, he was concerned that neither of them really understood why they were placed together in this relationship. Likely, Dr. Frey's student had similar thoughts. It will be important for Dr. Frey to follow-up soon with this student, and to be open and honest about his concerns. This will be an important step toward trust in the relationship, and a way for both to figure this out together. In preparation for this next meeting, Dr. Frey should clarify with experienced coaches or the director what his role will be and review any documentation provided by his program. If insufficient, Dr. Frey should let them know. Many programs are new and evolving. By being a team player Dr. Frey will likely help the program grow in effectiveness. He should start by asking the student questions, sharing experiences, and taking this opportunity to create a coaching agreement to solidify purpose. This new role Dr. Frey has taken on is an important one.

## Conclusion

Through preparation, open communication, and trust, coaching can be a rewarding experience for both the student and the coach. This chapter is meant to be a helpful guide to making the most of meeting time together. Emphasis has been placed on the need to be prepared for meetings, to ask questions, to listen, and to guide. While there are a number of different meeting types, the common theme has been guidance toward goal setting. Goals can be short-term, or there may be many small goals or milestones leading to a much more complex aspiration. Action plans are useful, as are coaching agreements if used effectively. Ultimately, the student will benefit most by actively participating in sessions with the coach, leading the agenda, and reflecting on progress toward set goals.

## References

1. Starr, J. *The Coaching Manual: The definitive guide to the process, principles and skills of personal coaching*. London: Prentice Hall Business; 2011.
2. Wiggins, G. Seven keys to effective feedback. *Educational Leadership*, 2012; 70(1): 10-16.
3. Family Educational Rights and Privacy Act (FERPA), U.S. Department of Education. <https://ed.gov/policy/gen/guid/fpcos/ferpa/index.html>. Accessed August 17, 2017.