

SWANSEA BAY UNIVERSITY HEALTH BOARD

Coaching Policy



Policy Owner: Director of Workforce & OD

Approved by:

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Introduction

Swansea Bay University Health Board's approach to learning and development is underpinned by our values 'Caring for each other, Working together & Always improving'. Coaching is a well-established method of providing effective, tailored development support to our staff. By investing in developing a coaching culture within SBUHB we aim to ensure that staff are able to benefit from coaching support and also to develop the foundational skills to support others through using a coaching approach.

Aim

To develop a culture across the organisation in which coaching is seen by all staff as a positive way to develop themselves, their teams and their services in support of the values of SBUHB and to provide the very best health care for local people.

By introducing a coaching culture, we aim to empower, motivate and develop staff to improve their personal performance and that of their team and in doing so, improve the performance of the overall organisation.

Scope

This policy supports the organisational Coaching Framework which outlines our vision for coaching within SBUHB along with a strategy detailing current and future planned activity.

It highlights the responsibilities of all stakeholders including the Executive Board, Service Delivery Units, Directorates, Trade Unions and the Learning & OD Department along with coaches, coachees and managers. In addition, the policy will define the procedures and processes for

- Accessing a coach
- Managing the coaching relationship
- Data protection & confidentiality
- Evaluation
- Professional standards and accountability
- Partnership working

Definition of Coaching

Coaching can be described as unlocking a person's potential to maximise their own performance. It usually consists of a series of one-to-one structured conversations between the coach and coachee, the topic of which is determined by the latter.

A coach can use their skills to support their coachee without needing any specialist or in-depth knowledge of the field in which the coachee works.

Coaching is open for all and can take the format of a formal one-to-one meeting or a more informal approach through staff using a coaching style to communicate with and support others.

This policy is related to the provision of formal coaching via the internal Swansea Bay Coaching Network and associated partner organisations.

Accessing a coach

A list of coaches is available on the intranet's [Learning & Development page](#). Here you can browse through the list of coaches along with their profiles. Once you have selected the coach you wish to work with, you may contact them directly through the link provided in their profile.

1-1 formal coaching is open for all staff to access. However, as the number of qualified coaches is limited, potential coachees may sometimes experience a delay between requesting a coach and starting the relationship.

Before requesting coaching, you should have read and understood this policy along with the supporting information leaflet 'What is Coaching?' [Appendix 3] as you will be asked to sign a working agreement following your first meeting with the coach [Appendix 2]. This is to ensure you understand what coaching is and what will be expected of you before, during and after the process.

It is our aim to ensure that coaching is available through the mediums of both Welsh and English. Should you be unable to locate a coach in the language of your choice, please contact the Learning & OD team for further advice sbu.coaching@wales.nhs.uk

Managing the coaching relationship

It is the joint responsibility of coach and coachee to agree the dates, timings, location and length of coaching sessions.

Both parties should commit to honouring the agreement, attending punctually and avoiding all distractions wherever possible during the coaching session e.g. laptop/mobile phone in order to give their full attention to the conversation.

As coachee, you must commit fully to the terms of the coaching contract and be prepared to provide feedback and formal evaluations as requested by your coach and/or the Learning & OD team.

You do not need to complete a study leave request in order to access coaching. However, where required you should ensure that you have your manager's agreement to attend coaching during normal working hours. Access should be organised to avoid unnecessary workload or service delivery difficulties.

Data Protection and confidentiality

Confidentiality is key to the success of a coaching relationship. All coaches operating within the SBUHB internal network have signed up to the organisations Coach Charter [Appendix 1] which means that they are bound by the Global Code of Ethics.

Under ordinary circumstances therefore, they will not divulge the content of your conversation to anyone else. However, there may be exceptions to this that your coach will discuss with you at the outset, for example if they had reason to believe that maintaining confidentiality would result in significant harm to yourself or others or if it would make them party to illegal activity.

Your coach may, with your permission, keep some limited notes of your discussion as an aide-memoir between sessions. However, these will not identify you by name and will be kept securely until no longer required at which point they will be destroyed. No written record of your conversation will be kept or submitted centrally.

Your coach will be required to provide an updated log of their coaching activity which includes basic details of the coachee such as name and department and the number of sessions carried out. Following your first session, a copy of the signed working agreement will be submitted to the Learning & OD team for secure storage. You will also be invited to complete an Equal Opportunities monitoring form which you may return yourself. As with any learning & development opportunity, the purpose of collecting this data is to monitor the uptake of coaching and ensure that access is fair and equitable across the organisation.

Evaluation

In order to ensure the quality of the coaching service provided across the organisation, evaluation will be carried out at various stages and through a variety of methods. Both the coach, coachee and where appropriate, the coachee's line manager will be asked to provide feedback on their experience, the outcomes achieved and the impact delivered as a result.

Professional standards and accountability

Our aim is to provide a professional, credible and sustainable coaching service within SBUHB. All coaches operating within the network will be qualified to a minimum of ILM Level 5 or be working towards achievement of this qualification. The coach's profile will indicate the level of qualification achieved.

Should there be any cause for concern about the professional standards displayed by any party within the coaching relationship, you may discuss your concern in confidence by contacting the Learning & OD team in the first instance at sbu.coaching@wales.nhs.uk

Partnership working

While this policy relates mainly to the provision of formal coaching within SBUHB, we are fortunate to enjoy close working relationships with other local and national public service organisations who also operate networks of coaches.

It is our intention to build on these relationships by developing reciprocal partnerships around coaching services. In practice, this means that should you wish to access a coach from outside the organisation for any reason, there is potential to do so, free of charge, from another organisation. Likewise, the reverse applies and SBUHB coaches may find themselves invited to coach staff from an external organisation.

It is the policy of SBUHB that such partnerships should be encouraged and supported and that all such requests be given due consideration for the benefit of all parties.

How can we all contribute? Key Roles & Responsibilities

- **Executive Board, Service Delivery Units & Directorates:** The Board and its senior management teams shall oversee and support the development of a coaching culture within the organisation, championing a coaching style of management, engaging in coaching where appropriate for their own development and ensuring sufficient resources are made available to support the growth and management of our internal coaching capacity.

- **Trade Unions:** The Trade Unions shall play a key role in ensuring their members are aware of the opportunities available to them through the coaching framework and policy. All members of staff whether they are a member of a recognised trade union or not will have the same opportunity to access a qualified internal coach.
- **Learning & OD:** The L&OD Team will take responsibility for managing the internal coaching network, providing the support and development necessary to ensure a quality service is delivered to our staff. They will also provide the opportunity for all staff to develop foundational coaching skills via the 2-day 'Coaching with Impact' course.
- **Line-managers:** Managers will ensure that their staff are aware of the opportunities available to them to receive 1-1 formal coaching and to develop foundational coaching skills where appropriate. They will also take responsibility for developing their coaching skills and modelling a coaching style of management within their teams whenever appropriate. Managers of coaches and coachees will commit to providing reasonable time away from the workplace for coaching to take place and will, when required, contribute to the evaluation of a coaching intervention by providing feedback.
- **Coach:** The coach is responsible for providing a professional coaching service to their coachees and for working with the L&OD department to support the effective running of the coaching network. They will take responsibility for acting in accordance with the Coach Charter ensuring that they operate with the highest ethical and professional standards and that these are maintained at all times within their practice.
- **Coachee:** The coachee will ensure that they place their coaching relationship at the centre of their working priorities. This means allowing time before and after sessions to prepare and to follow up on any actions agreed. Sessions should not be cancelled or postponed unless absolutely necessary and as much notice given as possible. The coachee will commit to the terms of the working agreement and to provide feedback on their experience as and when requested.
- **Coach Supervisor:** The coach supervisor's role is to support the professional development and well-being of the coach. They are responsible for providing a confidential supervisory service to coaches within the network and are bound by the same ethical standards. Coach supervisors will also be experienced, practicing coaches.

Appendix 1

Swansea Bay Coach Network

Charter for Coaches:

Name:

As an active member of the Swansea Bay Coach Network I commit to:

- Hold, or be working towards, an appropriate coaching qualification e.g. ILM Level 5 or equivalent.
- Be available to undertake a minimum of 4hrs coaching activity* per month.
- Engage in regular supervision [at least 3 sessions per year regardless of coaching hours] within one or more of the following formats:
 - 1-1 Supervision with a qualified coach supervisor
 - Group supervision led by a qualified coach supervisor
- Invest in my on-going development as a coach by engaging in regular CPD which may include some or all of the following:
 - Attending conferences
 - Attending local coach network meetings
 - Reading online journals / blogs
 - Reading relevant books
- Maintain accurate records of my coaching activity [to include supervision & CPD].
- Maintain an up-to-date profile on the Swansea Bay Intranet Site as the main source of information for potential coachees.
- Ensure all essential documentation is completed and submitted for each formal coaching intervention including Working Agreement, Post – Coaching Evaluation and Activity Records.
- Abide by the [Global Code of Ethics](#)

Signed.....

Date.....

* 4 hrs includes preparation time and travel if applicable

Appendix 2

Swansea Bay Coaching Network

Working Agreement

This document should be completed at the beginning of any formal coaching relationship to ensure both coach and coachee understand the scope of the relationship, the roles and responsibilities of both parties and the process by which the coaching will take place.

Coach Declaration:

In a coaching relationship, the coachee's agenda is at the centre of the relationship and will be worked on jointly by both coach and coachee. As coach, I do not have the answers to your issues but I am committed to working with you to explore them and help you identify how to move forward. I will at all times do my best to help you achieve all you want for yourself but there are no guaranteed results; you get out what you put in.

I will treat you with respect at all times and will treat all you tell me in confidence. In some circumstances there may be exceptions to this, for example if I have reason to believe that this confidentiality would result in significant harm to yourself or another person. However, I will always discuss this with you first so that we can agree a way forward together.

As an internal coach, I may work with people who are known to you but will let you know if there is likely to be a conflict of interest at any point.

Data Protection:

Once signed and agreed, you will receive a copy of this agreement for your personal records. My copy will be submitted to the Learning & OD team and stored securely as per the normal process for learning and development programmes. No details of our conversations will be kept or shared beyond ourselves unless you choose to do so yourself e.g. with your manager.

I may take some brief notes to use as an aide-memoir during our sessions, however these will be anonymised and kept securely until no longer needed when they will be destroyed.

In order to practice ethically as a coach, I will receive regular supervision where I will be asked to reflect on my practice. I may also be asked to contribute my impressions of the general themes that are emerging from my coaching relationships in order to identify any trends that may exist and that could help us inform future programmes. Please be assured that I will only discuss my own experience and will avoid any references that might compromise your anonymity or the confidential nature of our discussion.

Complaints procedure:

If you are unhappy with any aspect of our coaching relationship, please don't hesitate to let me know as soon as possible so that we can work together to resolve the issue. If you prefer, you may instead contact my coaching supervisor or the coaching network managers.

Coach Supervisor: Name: Email.....

Network Co-ordinator: Name Mike Dunnage Email: mike.dunnage@wales.nhs.uk

L&OD Manager:

Name: Marie Edwards

Email: marie.edwards4@wales.nhs.uk

Evaluation:

In order to monitor the quality of your coaching experience and for my own on-going development, I will ask you to provide feedback on your experience at various points during our coaching relationship. You may provide this feedback to me directly or submit it to the coaching supervisor named above.

Session Planning:

We have agreed to meet for sessions over a period of weeks/months. Our first coaching session will be on

Date:..... Time:.....

Either party can request a termination of this agreement if there is a breakdown in the coaching relationship, inadequate commitment to the process or inadequate progress being made.

Coachee Declaration:

I understand that taking part in coaching places responsibilities on me and I agree to;

- prepare thoroughly for each session, be punctual and actively participate
- carry out any actions that I choose to commit to within the sessions as per agreed timescales
- avoid cancelling or postponing our sessions unless in exceptional circumstances
- ensure that I am fully present at each session and not unduly distracted e.g. by phone or email.
- Provide timely feedback on my experience when requested

I have read and understood this agreement along with the supporting Coaching Policy. I have had the opportunity to ask any questions of my coach and am happy to agree to the terms of this agreement.

I confirm that I have discussed this development opportunity with my line manager and have their agreement to attend coaching for the number of sessions as outlined above.

OR

I am choosing to attend coaching outside of my core working hours.

Signed:

Coachee:..... Date:

Coach:..... Date:.....

Appendix 3

Swansea Bay Coaching Network

Would you like to;

- develop your leadership style?
- explore your individual potential?
- plan for the next step in your career?

If so, coaching could be the catalyst you need to realise your unique potential and achieve your goals

What is coaching?

Coaching is essentially a series of structured conversations where the coach works with you to help you achieve a specific outcome or goal.

The philosophy behind coaching is that you, the coachee, are in the best position to find solutions to the challenges you are facing. For that reason, your coach will not give you advice, nor will they necessarily have any expertise in your particular profession. However, by using appropriate listening, questioning and feedback skills, the coach will help you to gain insight into your situation, recognise what, if anything, may be holding you back and work with you to identify the right way forward for you .

Who is it suitable for?

Coaching is available to all staff but is particularly suited to individuals who wish to;

- Achieve their potential
- Clarify their career goals & prepare for their next step
- Enhance their problem solving ability
- Develop a greater flexibility and adaptability to change
- Explore what contributes to their confidence and motivation
- Unlock the creativity and innovation in themselves and their team

How does it work?

You will benefit from having one-to-one sessions with a qualified or trainee coach where you will be able to take time out from the hustle and bustle of the 'day job' and reflect on your own personal & professional development. With support from your coach, you will identify a specific goal or target and work through a tailored programme designed to help you achieve this.

How much time will it take?

This will vary according to your own individual needs but a typical coaching programme might last for up to 6 x 1hr sessions over a period of no more than 6 months.

Who are the coaches?

The Swansea Bay Coaching Network currently has around 30 qualified and trainee coaches available to support you. They are all NHS staff and will hold, or be working towards, a recognised, professional qualification. You can find out more about who our coaches are by visiting our [L&OD intranet page](#)

How do I get involved?

If you already feel that coaching is right for you, why not visit [our intranet page](#) where you will find more information about coaching in Swansea Bay UHB along with all the profiles of our current coaches. When you have found a coach you'd like to work with, simply contact them using the details given in their profile to check availability.

Should you have any problems using this service or if you simply want to find out more about coaching before deciding, please get in touch with the L&OD Team at abm.coaching@wales.nhs.uk or contact Marie Edwards 01792 530626 or Mike Dunnage 01792 530629 for an informal discussion.