

COMPETENCY ASSESSMENT

Competency Assessment Instructions:

Frequency of Competency's Behaviors Observed:

Not Demonstrated	= 0	Comment when you believed it could have added to the coaching
Low	= 1	Requires an observer's comment
Moderate	= 2	Comment optional
High	= 3	Requires an observer's comment

Overall - Your overall assessment rating should consider:

- Are the competency behaviors demonstrated frequently and at times where they are effective?
- Are the competency behaviors demonstrated in a manner whereby the coaching was focused on the client's needs and the agreed-upon coaching goal?
- Is the appropriate range of competencies demonstrated for this particular session?

Note: The competencies in shaded boxes may not be observed in all coaching sessions.

COMPETENCY ASSESSMENT - Rating Form

Coach's Name: _____ Observer's Name: _____ Date of Assessment: _____

Note: The competencies is shaded boxes *may not be observed in all coaching sessions.*

Cluster	Competency and Description	Rating	Comments
SETTING THE FOUNDATION	1. Meeting Ethical Guidelines and Professional Standards - Understanding of coaching ethics and standards and ability to apply them appropriately in all coaching situations.	0 1 2 3	
	2. Establishing the Coaching Agreement - Ability to understand what is required in the specific coaching interaction and to come to agreement with the prospective client about the coaching process and relationship.	0 1 2 3	
CO-CREATING THE RELATIONSHIP	3. Establishing Trust and Intimacy with the Client - Ability to create a safe, supportive environment that produces ongoing mutual respect and trust Establishes clear agreements and keeps promises.	0 1 2 3	
	4. Coaching Presence - Ability to be fully conscious and create spontaneous relationship with the client, employing a style that is open, flexible and confident.	0 1 2 3	
COMMUNICATING EFFECTIVELY	5. Active Listening - Ability to focus completely on what the client is saying and is not saying, to understand the meaning of what is said in the context of the client's desires, and to support client self-expression.	0 1 2 3	
	6. Powerful Questioning - Ability to ask open-ended questions that evoke self-discovery, clarity, possibility or new learning.	0 1 2 3	

COMPETENCY ASSESSMENT - Rating Form

Coach's Name: _____ Observer's Name: _____ Date of Assessment: _____

Cluster	Competency and Description	Rating	Comments
	7. Direct Communication - Ability to communicate effectively during coaching sessions, and to use language that has the greatest positive impact on the client. Uses metaphors and analogy appropriately.	0 1 2 3	
FACILITATING LEARNING AND RESULTS	8. Creating Awareness - Helps client to discover for themselves the new distinctions, thoughts, beliefs, assessments, emotions, moods etc. that strengthen their ability to take action and achieve what is important to them.	0 1 2 3	
	9. Designing Actions - Ability to create practices and self-observations to help client move forward. Challenges client's assumptions and perspectives to provoke new ideas and find new possibilities for action.	0 1 2 3	
	10. Planning and Goal Setting - Ability to develop and maintain an effective coaching plan with the client. Identifies and targets early successes that are important to the client.	0 1 2 3	
	11. Managing Progress and Accountability - Ability to hold attention on what is important for the client, and to leave responsibility with the client to take action. Clearly requests of the client actions that will move the client toward stated goals. Acknowledges client for what they have done. Holds the client accountable.	0 1 2 3	

OVERALL ASSESSMENT:

Does not meet competencies: _____ *Not Competent* _____ *Somewhat Competent*

Meets competencies: _____ *Competent* _____ *Very Competent*

COMPETENCY ASSESSMENT - Worksheet

Coach's Name: _____ Observer's Name: _____ Date of Assessment: _____

Instructions: As you listen to the applicant's taped or live coaching conversation, use this worksheet to help you keep track of each competency as you hear/see it demonstrated. An effective way to do this is to place a check mark in the appropriate competency box each time you notice a particular competency. At the end you will have a visual display of how often each competency was used during the session. It will also be useful to make notes under a particular competency if it was used inappropriately, or used very effectively. This will help you complete the ratings on the final **Competency Assessment Form**.

Note: The competencies in shaded boxes *may not be observed in all coaching sessions*.

Setting The Foundation	Co-Creating the Relationship	Communicating Effectively	Facilitating Learning and Results
			<u>8. Creating Awareness</u>
		<u>5. Active Listening</u>	<u>9. Designing Actions</u>
<u>1. Meeting Ethical Guidelines and Professional Standards</u>	<u>3. Establishing Trust and Intimacy with the Client</u>	<u>6. Powerful Questioning</u>	<u>10. Planning and Goal Setting</u>
<u>2. Establishing the Coaching Agreement</u>	<u>4. Coaching Presence</u>	<u>7. Direct Communication</u>	<u>11. Managing Progress and Accountability</u>