How to Use the Paperwork and Meet the Coaching Competencies Framework

Introduction

As part of your coaching practice hours for accreditation, you'll need to evidence that you meet the **Coaching Competencies Framework** set by the Association for Coaching (available in Simplero - Please read this document to support your accreditation process). This framework contains specific criteria within nine sections, and it's essential to demonstrate that your practice coaching sessions align with the criteria. We can do this through record keeping.

While we've provided sample paperwork in Simplero to help ensure that you are collecting evidence for your accreditation as you practice, **you are not required to use it exactly as it is.** The paperwork is an example. In fact, **it is required that you make adaptations to your coaching process, your paperwork, and the resources you use, to reflect your personal style as a coach, and to show that you have understood the needs of your coachees, within your niche.** So, you will need to modify the documents you choose to use, to make them more relevant to your context.

You are also welcome to use any format to document your evidence, such as:

- Video diaries
- Voice notes
- Handwritten journals
- Adapted versions of the provided paperwork

Charlie's advice: *Complete the paperwork based on your session with the client, and then go through the Competencies Framework and add which criteria you met in the session. For example, once you complete a Reflection Sheet, check it against the Competencies Framework. You might find that you have met several criteria with just one sheet, which will reduce the total number of Reflection Sheets you need to complete.*

To sum up the example paperwork is a tool. Use it as a guide to create evidence that fits your coaching practice. What matters most for accreditation purposes is demonstrating your ability to meet the competencies in a way that aligns with your niche and supports your coachees, along with your knowledge and understanding of what is good practice in a parent coaching context. **The example paperwork included here reflects Charlie's experience of best practices as a parenting coach and goes above and beyond the Coaching Competencies Framework to support you in becoming a confident and great coach.**

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Paperwork for Getting Started: First Contact with Your Client

The pre-coaching stage is an important foundation for the coaching process. While we've provided tools like the Questions to Get You Started and the Pre-Coaching Questionnaire, these are optional and fully adaptable. You can tailor them to suit your niche and the specific needs of your clients—whether your focus is personal, parenting, or work-based coaching. You use them as they are, or you might want to pick out a few questions that you are particularly interested in asking, or you might want to create your own questionnaire from scratch.

How the Pre-Coaching Questionnaire Can Be Used

- Gather useful information from your client before starting.
- After reviewing the responses, you can:
  - Discuss the answers at the first meeting.
  - Decide on coaching goals and outcomes together.
  - Begin filling in parts of the contract collaboratively during your initial contracting meeting.

Charlie's Recommendation: *The Questions to Get You Started and the Pre-Coaching Questionnaire will help you to fill in the contract. If the coachee has done the pre-coaching questions first it would help you decide on coaching outcomes for the contract. Recommend a pre-coaching email/call. Then have an initial contracting meeting and then fill in additional parts of the contract together. You can learn a lot about the coachee from how they respond to the request to fill in forms prior to the session, with what they don't say revealing as much as what they do, along with the way they answer the questions.*

Criteria this supports:

- 2.b) Helps the client establish coaching goals and outcomes and agrees on an approach to working with the client that will achieve them.

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Coaching Principles
You are not required to use the Coaching Principles document we've provided—it's optional. If you choose to use it, because you are aligned with the Co-Active Coaching practice methodology, adapt this example to fit your personal coaching practice.

Alternatively, you can base your work on another coaching model we have studied that aligns with your approach:

- TGROW
- Appreciative Inquiry
- CLEAN Language
- Or any other model that resonates with you and your coachees.

Create a one-page summary to explain your coaching approach and process in a way that works best for your own style.

Criteria this supports:

- 2.a) Clearly explains the coaching process and your coaching approach, models, and techniques.

Terms We Use
This document may or may not be useful to your practice depending on the circumstances. However, establishing a shared language can be important for clarity in your communications together. Because our course is aimed at the parents of children who experience the world differently, we have included these terms to help clarify our position on inclusivity whilst working with coachees. These terms might be brand new to your coachees. However, you're welcome to use your own language or adapt the terms to fit your client's preferences and your coaching context.

Criteria this supports:

- 2.d) Establishes clear roles, responsibilities, and boundaries between the different stakeholders, including coach and client.

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What is Coaching?
One of the key competencies in the contracting process is being able to clearly communicate how coaching differs from other helping professions. This is an essential part of establishing the coaching relationship and setting clear expectations with your client. It also evidences that you are also treating people fairly and equally. Use the "What is Coaching" pages to support your explanation. Create your own version tailored to your coaching practice. Include it with your coaching contract. Or, you can meet this competency in another way that works for you and your coachee.

Criteria this supports:
- 1.e) Clearly communicates how coaching is different from other helping professions.

Summary Policies
Including a summary of relevant laws and professional standards in your paperwork demonstrates your understanding of the legal and ethical framework for coaching in your country. This is also good practice to show a standard approach towards all coachees, treating people fairly and equitably. While these summaries are optional, they can reinforce your professionalism and ethical practice. Also, include The Global Code of Ethics in your communication with coachees to further support this criteria.

Criteria this supports:
- Primarily aligns with Section 1 of the competencies:
  - 1.a) Follows the AC's professional standards and codes of conduct, including the Global Code of Ethics for Coaches & Mentors.
  - 1.b) Acts ethically and with the highest integrity.
  - 1.c) Promotes the coaching profession in a positive light to all stakeholders.
  - 1.d) Complies with the prevailing laws of the country in which the coaching takes place and/or the client organization is operating, whichever is the most applicable and stringent.

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Coaching Contract

Your Coaching Contract is a critical document that must be adapted to reflect your coaching approach and preferences. This includes adding any personal information such as whether you have Public Liability Insurance or Professional Indemnity Insurance. (See FAQ for more information about insurance.) You might choose to add a clause clarifying that coaching is non-directive and based on the client's agenda, or a disclaimer that coaching does not replace medical advice or other professional support. The example contract provided has been adapted to act as evidence to underpin several of the criteria required for accreditation.
Optional: If you'd like to adapt the provided contract template, you can download it from Simplero, in the module on Printable Resources for New Coaches, in the section on accreditation.

Criteria this supports:

- 1.a) Follows the AC's professional standards and codes of conduct, including the Global Code of Ethics for Coaches & Mentors.
- 1.b) Acts ethically and with the highest integrity.
- 1.c) Promotes the coaching profession in a positive light to all stakeholders.
- 1.d) Complies with the prevailing laws of the country in which the coaching takes place.
- 1.f) Is aware of professional boundaries and refers on to another professional as appropriate.
- 2.a) Clearly explains the coaching process and own coaching approach, models, and techniques.
- 2.b) Helps the client establish coaching goals and outcomes and agrees on an approach to working with the client that will achieve them.
- 2.c) Agrees a formal coaching agreement with the client and all stakeholders, including clear and measurable outcomes, confidentiality, logistics (duration, frequency, location), contingencies, progress monitoring, and commercial arrangements.
- 2.d) Establishes clear roles, responsibilities, and boundaries between the coach and client.

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Reflection

Coachee Reflection

The Coachee Reflection Sheet, Coachee Session Notes, and Reflection Prompts are optional tools designed to support your coachee in reflecting on their coaching sessions. These documents can help raise awareness and insight for the coachee, but their use depends on whether they are useful for your practice and your coachee's needs.

Criteria this supports:

- Section 6: Raises awareness and insight.

Coach's Reflection Sheet

The Coach's Reflection Sheet is an essential tool for reviewing and improving your coaching practice after each session. It allows you to actively reflect on what worked well, what could be improved, and how you can grow as a coach. It is a very powerful tool that can support your coaching CPD over a period of time, enabling you to become a superb coach.

- **Ideal**: Fill out a reflection sheet after every coaching session.
- **Minimum**: Complete as many reflection sheets as necessary to meet the competencies. While there is no fixed number, it is unlikely that fewer than five would suffice to demonstrate adequate reflection.

Criteria this supports:

- Reflection sheets can address any or all of the competencies, depending on the content, and they will always meet:
  - 9.b) Actively reflects on coaching practice and outcomes.

Coaching Diary

The Coaching Diary is a tool for reflecting on sessions that were particularly challenging, interesting, or thought-provoking. It allows you to document key insights, explore complex coaching dynamics, and refine your approach.

- **Ideal:** Complete a diary entry after every such session.
- **Minimum:** At least one entry is required to demonstrate your reflection on a significant coaching experience.

Criteria this supports:

- Coaching diary entries can address any or all of the competencies, depending on what is written, and will always meet:
  - 9.b) Actively reflects on coaching practice and outcomes.

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Critical Reflection Sheet
The **Critical Reflection Sheet** is a specific document that needs to be completed for **two coaching sessions**. Its purpose is to demonstrate your ability to critically reflect on your practice and act on feedback to enhance your coaching. You are required to reference coaching theory in order to critically reflect on your practice. You can find out more about referencing in the FAQ document.

- Use the provided example as a guide for how this can be completed.

Criteria this supports:
- **9.c)** Acts on own critical reflections and client feedback to improve coaching practice.

Models and Tools

Coaching Tools and Checklists
These are optional resources designed to assist in your coaching sessions (there are plenty more in Simplero and beyond). They are not mandatory, and you are welcome to use your own tools, create custom ones, or simply rely on powerful questions. The primary purpose of these tools is to help your client gain a different perspective and deepen their awareness.

Criteria this supports:
- **Section 6:** Raises awareness and insight.

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Coaches Evaluation Process Sheet
Evaluation is a critical aspect of coaching, as outlined in Sections 8 and 9 of the competencies. You are required to measure the effectiveness of your coaching, gather regular feedback from your coachee, and reflect on this feedback to enhance your practice.

How you choose to evaluate is flexible and should suit your coaching style and the needs of your coachee. Options include using the provided template based on Kirkpatrick, create your own process and document it, ask for verbal feedback after a session, gather feedback at a review session or at the end of the coaching relationship.

Charlie's practice is to ask for feedback after each session. She also strongly recommends evaluating for ***quantifiable impact (using a tool like Kirkpatrick)****, to demonstrate the effectiveness of your coaching and gather information for marketing your services.*

Criteria this supports:

- Section 8: Measures and evaluates the effectiveness of coaching.
- Section 9: Demonstrates evidence of regular feedback.

Final Note

All tools, templates, and forms provided are examples to help you meet the competencies required for accreditation. They are adaptable and flexible, allowing you to tailor them to your niche and the needs of your clients. What matters most for the accreditation is how you use these resources to align with the Coaching Competencies Framework and deliver effective coaching.

What matters most to us is that you become confident, effective coaches with a thorough understanding of your own practice and a bank of useful resources at your fingertips.