



**PORTLAND**

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## **Coaching Program: Handbook and Guideline**

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# Vision Statement

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The SIM PDX Chapter envisions having a highly regarded, thriving, annual Coaching program that provides members with opportunities for growth in soft skills and professional development thus helping participants further develop toward their full potential. This adds to the membership's value proposition and strengthens the chapter's ability to engage and retain members, as well as attract new members.

# Mission Statement

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The mission of the SIM PDX Chapter Coaching program is to help our members overcome professional challenges by providing them with the knowledge and thought processes that will enable them to maximize their personal potential.

# Program Goals

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The following Goals are the cornerstone of the coaching program:

For the Membership:

- To provide the opportunity to further develop their soft and professional skills
- To show that membership in SIM PDX provides a valued return for the member's yearly investment

For the SIM PDX Chapter:

- To increase membership engagement and participation
- To increase membership retention
- To provide another marketing/PR selling point

# Guiding Principles

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All program participants and administrators acknowledge the following as core tenets and values that are to be upheld in all circumstances:

- **Honesty:** If you expect your coach to help you, then you must be prepared to build a very open and honest relationship with him or her. The more you give to your Coach, the more you will receive in return.
- **Trust:** This is the cornerstone for establishing and maintaining your coaching relationship. The coach and Coachee should be able to trust each other and prove worthy of being trusted.
- **Integrity:** Good factual information is the foundation of your success. You both must insist on exchanging information openly. If you want your coach to act with integrity, you must show that you always act with integrity. That means no duplicity, no inconsistency with what you value and believe.
- **Respect:** All interactions will be conducted in a kind and courteous manner.
- **Due Care:** The Coach, as a reasonable person, will always endeavor to provide to the Coachee the best advice possible under the circumstances.
- **Recognition of Access Limitations and Personal Boundaries:** Take the time to talk frankly about what each of you expect to give and take in terms of time, as it will vary from relationship to relationship. Also, make sure that you are on the same page about how you prefer to interact and the boundaries you wish to establish.
- **Genuine Interest:** Both parties express a sincere interest in continuous self-development.
- **Reciprocal Relationship:** - It is expected that Coach and Coachee should learn from each other.
- **Synergy:** Effective Coaching requires teamwork and commitment of both parties.
- **Confidentiality:** All information shared between the Coachee and Coach, or with the Coaching Council, is confidential with the exception of information regarding: 1) injury or potential injury to one's self or others; 2) child abuse; 3) breach of laws or 4) other situations that pose a danger to the general public, which may obligate a coach or Coachee to act on or relay to appropriate authorities.
- **Heighten Potential:** The Coaching relationship should inspire new possibilities and seek opportunities to stretch and grow.
- **Patience:** It is recognized that personal growth takes time and that changing behavior is hard work.

Lastly, to ensure that participants have a clear and consistent understanding of the Coaching program we make explicit what behavior and goals are considered contradictory to the program objectives:

- Program participation is not a means to enhance your professional network or have your network enhanced by using your coaches contacts
- Coaching is not about job seeking thru your Coach.
- Coaching is not about life coaching. The goals of the Coaching relationship are bounded by the Coach/Coachee agreement unless explicitly agreed upon by both parties.

# Operating Guidelines

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The program is built on the following key operating principles:

1. Coaches are to be solicited based on their experience, professional accomplishments, and enthusiasm to participate in the program.
2. Coachees are to be selected by the Coaching Council through an application process, primarily on the ability to match them with a Coach and successfully achieve their goals.
3. Coaches and Coachees are to be matched by the Coaching Council in a process that includes application documents review, telephone interview, and Coach Consultation. The basis for a Coachee/Coach pairing is the Coachee's intended or desired career interests, challenges, and related skill and experience requirements. Coaches are recruited to match Coachees' goals and requirements.
4. Participation is voluntary and driven by the Coachee. The program operates on the philosophy of personal motivation and discipline.
5. The coaching runs the program year or portions agreed upon. It is extended only at the agreement of both Coach and Coachee.
6. Mutual expectations and benefits are defined and 'contracted' by the Coach and Coachee at the outset of the relationship.
7. The Coaches and Coach set the content of their ongoing agenda.
8. Feedback by the Coachee and Coach provided to the Coaching Council is an integral part of the program. The effectiveness and success of the program will thus be monitored and assessed to ensure that the program provides value to the Coachee, the Coach, and SIM PDX.
9. Feedback and self-reflection are important components of the learning and development process of the program for both Coachee and Coaches.
10. A commitment of time to the relationship by both the Coachee and the Coach is critical. It is expected that Coaches and Coachee will meet at least once a month, on average. Any additional time is determined by each partnership.
11. The quality of communication will be enhanced by increased face-to-face time. It is recommended, but not required, that Coach and Coachee meet in-person at least every 3 months. Coaches and Coachees are strongly encouraged to arrange their first interaction to be face-to-face, to use that time to set clear objectives for the relationship, and to establish expectations on the frequency and type of interaction based on those objectives. Video conferencing is also encouraged to whatever degree possible.

In support of the Mission, the following objectives are to be recognized and accomplished:

- A. Provide a Coaching program that integrates Best Practices with the highest ethical and professional standards and that fulfills the goals of its participants.
- B. Effectively communicate the Coaching Program goals, structure, and operations to the SIM PDX Membership.
- C. Recruit the most experienced, professionally accomplished, and effective Coaches possible.
- D. Solicit and incorporate advice from experienced Coaches and program administrators.
- E. Integrate key learnings from each program into subsequent deliveries.
- F. Select Coachees based on the ability to fulfill their goals within the program, their application, their perceived enthusiasm for the program, and the ability to match them with a suitable Coach.
- G. Provide the means for feedback both during and after the Coaching engagement to assess ongoing progress and gain insight for future programs.
- H. In recognition that all participation is voluntary and in addition to participants other responsibilities, time demands on participants are to be kept to a minimum.

# Success Factors

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Success will be indicated by following criteria:

- Positive feedback by participants with respect to softskills growth and professional development.
- Positive feedback by participants with regard to program structure and efficacy.
- The willingness of Coachees to recommend the program to others.
- Consistently strong, and/or growing number of Coaching Program applications

The following activities will be carried out in support of achieving the Success Factors above:

- Periodic email reminders from the Coaching Council to participants regarding expectations and progress
- Submission of a Status Report by Coachees on scheduled due dates.
- The submission by participants and subsequent review by the Coaching Program Council of a Final Coach/Coachee Summary Reports
- Periodic summary presentations to the SIM PDX Executive Board regarding Coaching Program Success Factors

# Governance

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To realize the Vision and Mission of the SIM PDX Coaching Program and to accomplish its objective, the following describes the means by which the SIM PDX Chapter will establish and conduct the Coaching Program:

- The Coaching Program will be ultimately supervised by the SIM PDX Executive Board
- A Coaching Council will be formed to establish and administer the program
- The SIM PDX Executive Board will endeavor to identify and recommend experienced and effective Coaches

# Coach/Coachee Roles and Responsibilities

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The following is an elaboration of the Coaching Council's expectations regarding the interaction, deliverables, and relationship between Coaches and Coachees.

## ***Common Responsibilities***

Both Coaches and Coachees are expected to fulfill the following expectations:

- Conformance with the Coaching Program Handbook in all circumstances and interactions
- The communication between the Coach and Coachee adds up to at least one hour a month and is frequent enough for both of you.
- Meetings and telephone sessions will be conducted in a mutually convenient venue that is quiet and otherwise free from distraction and interruption.
- Other than administrative matters such as scheduling and coordinating interaction, no contact beyond the established agreement between parties should occur without the other party's permission.
- All information shared between the Coachee and Coach is confidential with the exception of information regarding: 1) injury or potential injury to one's self or others; 2) child abuse; 3) breach of laws or 4) other situations that pose a danger to the general public, which may obligate a coach or Coachee to act on or relay to appropriate authorities.
- Participants must be willing to sign a Non-Disclosure Agreement if the other party feels it is necessary or appropriate.
- If there are issues on the part of the Coach or Coachee that are not able to be resolved, these are to be immediately brought to the attention of the SIM PDX Coaching Council.
- The Coachee or Coach may terminate the Coaching relationship by notifying in writing the SIM PDX Coaching Council and explaining the reason for early termination.

## ***At the First Meeting***

- You and your Coach discuss and agree regarding the "fitness of the match" between you, and contact the Coaching Council if you feel a mismatch exists.
- You and your Coach should establish a meeting schedule.

## ***At Each Meeting***

- You and your Coach are clear on why you're together and the reasons you're meeting. You've discussed and agreed upon what you'll work on, and you'll recognize when you've met your purpose.
- Be prepared for each session. Respect one another's time and commitment to the effort.
- You're aware of the four stages of formal Coaching (planning, building relationship/negotiating agreement, developing the Coachee/maintaining momentum, and ending the formal Coaching

part of the relationship) and are carefully moving through them. You like how you operate as a Coaching pair and check in with each other to see if you're both satisfied.

- Communicate any concerns with respect to the relationship and progress to the Coaching Council as soon as possible.

### ***At the Final Meeting***

- Prepare and submit an individual (1 Coach, 1 Coachee) Final Summary Report at the conclusion of the program. The purpose is simply to provide insight as to how effectively the goals (soft skill and professional) originally agreed upon between the Coachee and Coach were achieved. Provide your opinion and insights as to how the program can be improved. The content of this report should not breach the confidential nature of the Coach/Coachee relationship.

## ***Coach Responsibilities***

In addition to the Common Responsibilities, Coaches are expected to fulfill the following expectations:

- Review Coachee CV and Application prior to the first meeting
- Jointly develop a strategy that will lead to goal attainment
- Seek First to Understand. Listen carefully to Coachee's goals, issues, obstacles, and feedback
- You welcome and keep in confidence the information your Coachee shares with you. Your Coachee knows he/she can count on you to be honest yet safe and to follow through on your promises.
- Offer ongoing practical advice relevant to Coachee goals
- Suggest exercises, reading, and general advice relevant to Coachee goals
- Monitor and discuss Coachee's follow-through on the specific advice and counsel provided

## ***Coachee Responsibilities***

In addition to the Common Responsibilities, Coachees are expected to fulfill the following expectations:

### ***At the First Meeting***

- Agree to communicate in the ways (in person, phone, text messaging, email, mail) you both prefer. Establish common expectations regarding your responsiveness to communications. Meet those expectations.

### ***At Each Meeting***

- Be prepared to discuss your ongoing activities relevant to stated goals
- Be frank and forthright in your interactions with your Coach. Do your best to communicate your needs, expectations, and challenges.
- Welcome and keep in confidence the information your Coach shares with you. Your Coach knows he/she can count on you to be honest and to follow through on your promises.
- Be responsible for scheduling future sessions (scheduling at least 3 months out is highly recommended by the Coaching Council)

- Express your appreciation for constructive criticism and corrective feedback, and use the information to reinforce your efforts. Take steps to apply constructive feedback as soon as possible.
- Be prepared to provide your Coach with positive feedback about his/her Coaching and other things he/she has shared.
- Make every attempt to embrace and internalize the advice and feedback you receive.
- Discuss relevant successes in your meetings.
- Communicate any difficulties you are having in implementing the changes you seek, and discuss challenges and potential alternative tactics.

# Coach Guidelines

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Your commitment and dedication to your Coachee may be the most profound opportunity that you may experience. The quality of the relationship you build directly influences the life and future of the participant. Please exert every effort to maintain professional standards, improve your Coaching skills, and exercise good judgment when engaged in any activity involving your Coachee. Your role in the relationship is complex and includes that of:

- Positive Role Model
- Coach
- Trusted Advisor
- Self-esteem Builder
- Career Counselor
- Advocate

The following is provided as basic guidance for new Coach. It should be read carefully and reviewed periodically to ensure its lessons remain fresh:

- At the initial stages of the engagement, it is possible your Coachee may appear to be hesitant, unresponsive, and perhaps even unappreciative of the relationship. This “guarded” attitude is often simply a manifestation of his/her insecurity about the relationship. The Coachee’s attitude will gradually take a positive turn as he/she realizes your sincerity about your role. **BE PATIENT!** Attempting to speed up the process by going out of your way to accommodate your Coachee, or seeing your Coachee more often than agreed, sets poor precedent and can be a mistake.
- Remember the Coach/Coachee relationship has a “start up” phase during which the Coachee is more interested in getting to know how “real you are” and building trust. Early activities should include establishing communication preferences and meeting locations. Ground rules regarding contact should also be re-affirmed.
- Experience demonstrates it is counterproductive to assume roles other than a dependable, consistent advisor. Present information carefully without distortion and give all points of view a fair hearing. Listen carefully and offer possible solutions without passing judgment. Don’t criticize or preach. Think of ways to problem solve together rather than lecturing or telling the Coachee what to do. Maintain the focus on productive future actions rather than past mistakes.
- Respect your Coachee’s individuality and influence them through constructive feedback. The Coach empowers the Coachee to make “right” decisions indirectly --without actually deciding for the Coachee. Identify the Coachee’s interests and take them seriously. Be alert for opportunities and “teachable moments.” Explore both the positive and negative potential consequences of decisions.

# Remediation Process Guidelines

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Although every reasonable effort will be made to match Coaches and Coachees to achieve the best possible outcome, there remains the possibility of mismatch. In recognition of this potential, the Council will entertain requests from either party for re-matching as necessary, although no guarantees can be made regarding a successful rematch. Request for remediation should be made within the first three months of the engagement to allow sufficient time to secure a new Coach and not jeopardize a successful outcome. Please email the Coaching Program Council ([simpdx.leadership@gmail.com](mailto:simpdx.leadership@gmail.com)) with subject line "Coaching Program: Remediation Assistance" to discuss your status and possible remediation.

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