

REFOCUS Coaching Conversations for Recovery, 2nd edition

Participant Guide



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Context Setting

The first edition of the REFOCUS Coaching Conversations for Recovery manual was published in 2014. It was developed as part of the REFOCUS Programme, a research study which included the development of the REFOCUS Intervention to increase the support for recovery offered by front-line clinical staff to people using mental health services. Coaching skills training for staff is a central component of the REFOCUS Intervention, and the first edition was used to provide the coaching skills training given in the REFOCUS Trial (ISRCTN02507940). The aim of the coaching skills training was to help staff to develop a coaching style in their day-to-day practice, i.e., to use specific skills and techniques to help service users both to build their inner resourcefulness and to set and achieve their own meaningful goals.

The REFOCUS Intervention, including the coaching component, has become widely used as an approach for mental health workers to support recovery. This second edition of the REFOCUS Coaching Conversations for Recovery manual was published in 2023, and incorporates learning from the use of REFOCUS in multiple countries and in diverse clinical settings.

REFOCUS and Coaching

Coaching is used in the REFOCUS Intervention for two reasons. First, the three underpinning values are synonymous with a coaching approach:

Value 1: The primary goal of mental health services is to support personal recovery. Supporting personal recovery is the first and main goal of mental health services. Providing treatment can be an important contribution towards this goal but is a means not an end. Similarly, intervening in crisis or addressing risk issues may sometimes need to take precedence, but should be orientated around the primary goal of supporting recovery.

Value 2: Actions by mental health professionals will primarily focus on identifying, elaborating, and supporting work towards the person's goals. If people are to be responsible for their own life, then supporting this process means avoiding imposing clinical meanings and assumptions about what matters, and instead offering support which is consistent with the person's values as they work towards their life goals.

Value 3: Mental health services work as if people are, or (when in crisis) will be, responsible for their own lives. It is not the job of mental health professionals to fix people or lead them to recovery. The primary job is to support people to develop and use self-management skills in their own life.

Second, the REFOCUS Intervention uses three working practices (i.e., desired staff behaviours):

1. Understanding Values and Treatment Preferences
2. Assessing Strengths
3. Supporting Goal Striving

Each of these is supported by coaching. Staff are trained to use a coaching style approach to support the use of an individual's own strengths, resourcefulness, personal values and treatment preferences in planning care, with the aim of encouraging self-directed goal striving by the person using mental health services.

The REFOCUS Intervention has been evaluated in randomised controlled trials in England and Australia:

Slade M, Bird V, Clarke E, Le Boutillier C, McCrone P, Macpherson R, Pesola F, Wallace G, Williams J, Leamy M (2015) *Supporting recovery in patients with psychosis using adult mental health teams (REFOCUS): a multi-site cluster randomised controlled trial*, *Lancet Psychiatry*, **2**, 503-514.

Meadows G, Brophy L, Shawyer F, Enticott J, Fossey E, Thornton C, Weller P, Wilson-Evered E, Edan V, Slade M (2019) *REFOCUS-PULSAR recovery-oriented practice training in specialist mental health care: a stepped-wedge cluster randomised controlled trial*, *Lancet Psychiatry*, **6**, 103-114.

Using this Manual

You will need three manuals.

This document is the training manual for mental health staff. The reference is:

Grey B, Nahabedian N, Leamy M, Slade M (2023) *REFOCUS Coaching Conversations for Recovery. Participant Manual, 2nd edition*, London: Slam Partners.

It is used with the coaching trainer manual:

Grey B, Nahabedian N, Leamy M, Slade M (2023) *REFOCUS Coaching Conversations for Recovery. Trainer Manual, 2nd edition*, London: Slam Partners.

and with the REFOCUS Intervention manual:

Bird V, Leamy M, Le Boutillier C, Williams J, Slade M (2011) *REFOCUS (2nd edition): Promoting recovery in mental health services*, London: Rethink.

All three manuals can be downloaded at www.researchintorecovery.com/refocus.

References to specific pages in the REFOCUS Manual are indicated by the following symbol and the page reference e.g. • p X.

Please note that although this training manual is available for download you will not be able to use it to self-train as it complements the interactive, dynamic learning activities of the REFOCUS Coaching Conversations for Recovery training programme.

Background to REACH©

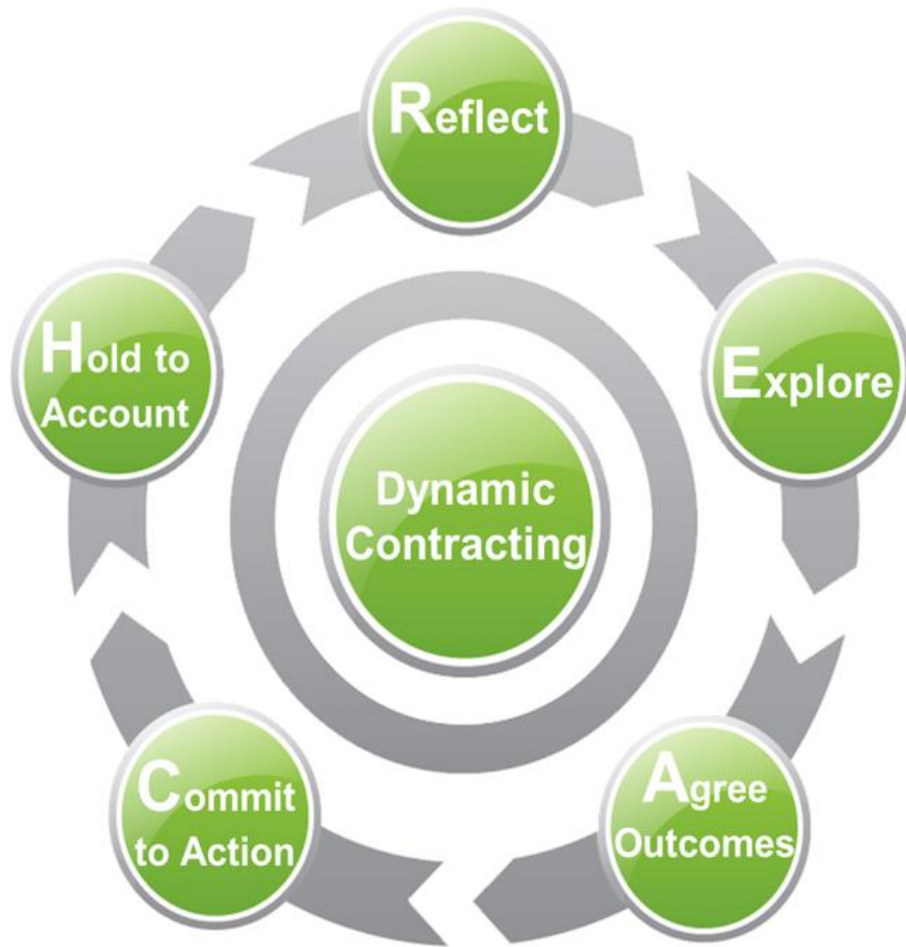
The Slam Partners' coaching approach is about encouragement and challenge to help individuals or groups consider and make positive changes. Evidence-based coaching and health coaching frameworks and models are all fairly similar. We developed our own coaching framework, REACH© which enables people to have more straightforward and healthier conversations that lead to positive actions.

The REACH© framework emphasises accountability more explicitly than other frameworks and models and involves connecting the head (thinking), heart (feeling) and hand (doing) to achieve identified goals. Making expectations and agreements explicit from the outset is key to effective health coaching conversations and to creating a safe environment. This is termed psychological contracting and is the heart of the REACH© framework.

Each letter of REACH© represents a stage of the coaching conversation:

- R**eflect: an active process that utilises active listening skills and creates an opportunity for connecting thoughts and feelings.
- E**xplore: the use of powerful questions to test assumptions and elicit a range of options.
- A**gree outcomes: helps to focus the conversation and agree the desired results.
- C**ommit to action: essential in the process as it helps determine the action that will be taken (by whom and by when).
- H**old to account: take responsibility for follow through and consequences for achieving or not achieving the outcomes.

The REACH© Coaching Framework



Core Coaching Skills

1. Dynamic contracting
2. Exquisite listening
3. Using powerful questions
4. Setting and achieving goals
5. Stretching and challenging

Overview of REFOCUS Coaching Conversations for Recovery

Learning Outcomes

By the end of the programme participants will:

- Be able to demonstrate how a coaching approach supports the implementation of recovery focused practice.
- Be equipped with knowledge of the core competencies required for working effectively with a coaching style.
- Have developed their skills and be able to embed a coaching style within their clinical practice.
- Have built the capacity and capability of teams, services and the organisation to successfully implement the REFOCUS Intervention's three working practices through the development of a coaching ethos.

Learning Objectives

As part of this programme, participants will:

- Understand what a coaching style is.
- Recognise what a coaching style is not.
- Learn how to integrate key skills and competencies of a coaching style into their day-to-day clinical practice.
- Experience being coached and coaching others and observe others coaching.
- Empower service users.
- Gain skills in having productive and tough conversations.
- Practise using the skills and competencies of a coaching style as members of a clinical team.
- Observe others using a coaching style.
- Have opportunities for debriefing coaching experiences within a supported environment.
- Apply group learning to enhance coaching practice.
- Explore new ideas and stay 'curious' as members of a clinical team.

Session One: Self-assessment and self-management

Activity 1(a):

On your own complete your self-assessment of your confidence in using coaching skills. You will revisit this at the end of the programme (appendix 1).

It is important to think about the components of verbal and non-verbal communication, how people develop rapport and the essence of congruence in coaching conversations. The concept of emotional intelligence is central to this (appendix 2).

The starting point for Emotional Intelligence is self-awareness. This includes being aware of the values and beliefs that underpin your thoughts and behaviour. It is important to pay attention to the impact these may have on your coaching style conversations. Equally it is important to consider what values and beliefs might shape the thoughts and behaviours of others.

Activity 1(b):

Considering your responses to your self-assessment

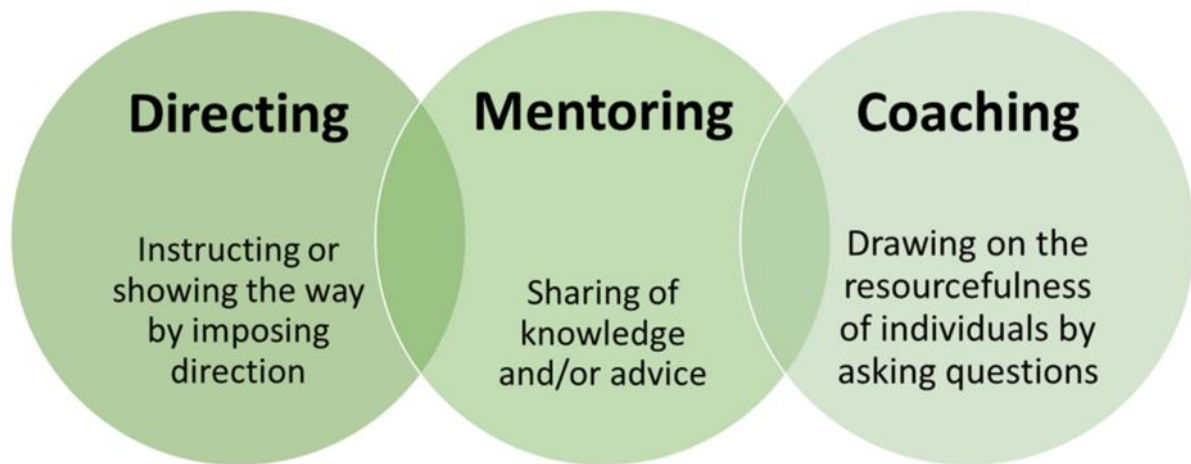
In pairs: Have a conversation with a partner sharing:

- What are your strengths?
- What values and beliefs do you hold that will have an impact on how you work with people?
- What might you need to pay attention to?
- What feedback would you like from others on the programme to help you learn and practise different skills?

Session Two: Introduction to the Principles of Developing a Coaching Style

Activity 2:

In pairs: Have a conversation with your partner about what you think a coaching style is.



Directing	Is showing the way by imposing direction.
Mentoring	Is a process for the informal transmission of knowledge.
Coaching	Is about drawing on the resourcefulness of individuals.
Therapy	Is a restorative process often using a metaphor of healing.

Examples of these can be found in appendix 3.

Developing a coaching style

The principles:

- The individual is resourceful – and does not need to be ‘fixed’ or protected.
- The role of clinical and support staff is to creatively challenge, hold to account and help the person make best use of their own resources.
- The relationship is based on respect and equity.
- Coaching is action oriented.
- Coaching is about engaging the best in individuals and teams to achieve results.

Session Three: Dynamic Contracting

Definition of Dynamic Contracting: Gaining clarity about expectations, rules of engagement, agreeing how to be and/ or work together, how to manage differences and conflict and detailed practicality of work to be completed. This is a dynamic process, not an individual event and therefore will need to be reviewed and updated as appropriate.

In practice Dynamic Contracting means: Making the psychological contract more explicit. The psychological contract refers to “an unwritten set of expectations operating at all times” between individuals (p. 22, Schein, 1965). Making the contract more explicit is done through the process of having honest conversations to mutually agree expectations in relation to behaviour, objectives and ‘rules of engagement’. It requires working sensitively and paying attention to potential differences and acknowledging diversity. Contracting is a live and iterative process which evolves as the conversation and relationship develops.

When you meet for a coaching style conversation, you may want to think about:

- How much time do we have together?
- What do we need to have achieved by the end of this conversation together?
- What can we expect/ need from each other?
- What are the confidentiality parameters for this conversation?
- What other boundaries might we need to consider?
- What is important to know about one another’s style?

This is not an exhaustive list and there are many other questions that may be appropriate in different circumstances.

Moving to a coaching style where there is an existing relationship, without being transparent, can cause surprise and confusion. Therefore, a re-contracting conversation needs to take place which highlights how you will be working differently.

Activity 3:

In pairs: Practice using dynamic contracting to start a coaching conversation.

Session Four: Exquisite Listening

Definition of Exquisite Listening: Exquisite listening focuses on the person with whom you are having the conversation. When you are listening exquisitely you are 'fully present' and in tune with the person's verbal and non-verbal communication e.g.: words, tone of voice, pace, movement, eye contact, posture, gestures.

In practice Exquisite Listening means:

- Keeping your own 'stuff' out of the way.
- Monitoring your own listening during the interaction.
- Demonstrating unconditional positive regard.
- The ability to be silent and listen without interrupting the other person.
- Being able to validate the person, letting the other person know that 'you see/ you hear/ you recognise them'.
- Reflect back and check what you think you have heard.

Two levels of listening:

- **Level One listening:** Focuses on yourself and you are not likely to be 'fully present'.
- **Level Two listening:** Exquisite listening, i.e.: being 'fully present'.

Activity 4(a):

Group listening exercise.

Activity 4(b):

In pairs:

- Take turns to tell your partner about something that means a lot to you.
- As the 'listener' you may not speak at all. You may nod, smile, use facial expressions as appropriate, but you may not speak.
- Once finished the listener should share the five most important things they heard during the conversation.
- Did you hear more than you would have done otherwise?
- What values and beliefs did you notice (yours and/ or theirs)?
- Change roles and repeat the exercise.

Reflecting back

Summarising keeps the conversation on track. It demonstrates that you are really listening and helps the other person to review and consider what they have said. This can often provoke new and deeper thinking.

Paraphrasing what the other person has said is another way of helping them reflect on their own situation. It is powerful to reflect back the person's own words as it signals non-judgemental listening and acceptance.

Activity 4(c):

In pairs:

- Take turns to tell your partner about something that means a lot to you.
- As the 'listener' you may interject to summarise and/ or paraphrase when you think it is appropriate to do so.
- Change roles and repeat the exercise.

Session Five: Powerful Questions

Definition of Powerful Questions: A powerful question is one that gets to the heart of the matter and challenges someone to move beyond their usual way of thinking.

In practice Powerful Questions means:

Using:

- Questions that get to the heart of the matter and move beyond the person's 'rehearsed material'.
- Open questions – that begin how, where, when, what.
- Outcome questions – that take the person towards the desired outcome.
- Using short (7–12 words) questions – keep it simple.

Avoiding:

- Multiple questions.
- Embarrassing and/ or undermining questions.
- Advice disguised as questions.
- Unhelpful questions searching for facts – revealing your own anxiety for information and facts about the issue.

Using sparingly:

- Closed questions.
- Questions with more than 12 words.
- Questions beginning with 'Why' (used too early can be experienced as a judgement).
- Questions beginning with 'Do' or 'Is' (can close a conversation down).

Being conscious of pace and timing:

- Allow space between questions, too many questions too quickly means that you are likely to be in level one listening mode.
- Consider what types of questions you might ask at different stages of the conversation.

Exquisite listening will ensure that the questions offered are relevant and effective.

Activity 5

In groups of three:

- Take turns to be clinician or support staff member, the service user and observer to undertake a coaching session.

As the **coachee/ service user** you should create a scenario about which you would like to gain insight to make changes. In this exercise your role as service user is to participate actively.

When you are in the role of the **clinician/ support staff member** as coach you should be thinking about

- Contracting
- Listening
- Practising the use of powerful questions

The role of the **observer** is to time-keep, keep brief notes of powerful questions that 'landed' with impact and to call the session to a close. Appendix 4 provides a checklist of the type of things to look out for.

At the end of the three rounds of coaching, together de-brief this exercise and:

- Consider what specifically made some questions more powerful than others
- Prepare to feed back to the wider group

Session Six: Setting and Achieving Goals

Definition of Goal Setting: Deciding what you want and determining the milestones for how you will achieve it.

Definition of Goal Striving: Making a committed effort to attain a goal, developing and maintaining hope and resilience even in the face of setbacks.

More information about goal setting can be found in appendix 5.

Goals are key within coaching as they:

- Focus attention and concentrate energies in a particular direction. Note that 'where attention goes, energy flows'.
- Give meaning to activity.
- Can provide a sense of satisfaction in working towards and/ or achieving the goal.
- Can motivate people by providing a vision and an outcome at the start of the activity.
- Help empower individuals by moving the focus from the problem to possibilities.
- Provide an opportunity to explore underpinning beliefs, values and motivating factors.

In practice goal setting in coaching involves:

- Clarifying the overarching goal and agreeing specific outcomes for the session.
- Working in partnership to prioritise the necessary steps and action(s).
- Exploring what makes the goal important for them.
- Asking questions that allow people to connect with their own resourcefulness.
- Revisiting and reviewing the goal throughout the conversation (as goals can change through exploration).

Activity 6:

In groups of three:

- You should each have a turn of being the coach, coachee and observer. As a coach, build on your skills of contracting, exquisite listening and powerful questions, to practise the skills of goal setting with your coachee.

The **coachee/ service user** should participate actively in discussing outcomes and setting suitable goals toward which she/he wishes to strive.

The **clinician/ support staff** should practise the skills of goal setting and agreeing outcomes. They should also be the timekeeper for this exercise to practice managing the process.

The **observer** is to make notes and notice what has been effective and less effective in goal setting and outcomes coaching

At the end of three rounds of coaching, discuss together what you have learnt about goal setting and goal striving in a clinical coaching context.

Session Seven: Stretching and Challenging

Definition of Stretching: Being able to stay curious so that you can ask a question that can enable someone to move and consider a new option or perspective that may be uncomfortable for them and which may help create a positive action.

Definition of Challenging: Having the courage to engage, call into question an existing situation, behaviour, attitude or belief and invite a conversation that can help a person use their resourcefulness to resolve a problem and take responsibility for actions for which they then hold themselves to account.

Definition of Confronting: Facing up to a problem and dealing with it. Confronting can be used at times to instigate a coaching style conversation when an issue needs to be raised. Doing this early on can help create more robust relationships for improved outcomes and help develop resilience in individuals.

Example questions to stretch and challenge:

- What would be a more breath-taking action you could take?
- What is the scariest thing you could do?
- How could you turn the volume up on that?
- What would the most courageous version of 'you' do?
- I sense you may be avoiding something – what might that be?
- What are you unwilling to address?
- What's missing?
- How long do you want to repeat this pattern?

Activity 7:

In pairs: Practise confronting and challenging skills:

- Use the framework in Appendix 6
- Initially work on your own and write a 90 second statement about a challenging scenario and prepare to read it aloud to your partner to get their feedback and comments. This is not a role-play exercise.
- Seek feedback from your partner on how the statement sounded, how they experienced it and make any changes necessary based on the feedback received.

Session Eight: Interrupting and Permission Seeking

Definition of Interrupting: Skilfully cutting short a conversation if it is going 'off track' or becoming too detailed. Interrupting allows you to:

- Give 'air time' to the things that really matter and manage the available time effectively for both of you.
- Avoid becoming involved in any 'red herrings' introduced by the other person either knowingly or unwittingly.

How to interrupt: You can interrupt by asking questions to redirect the conversation or by summarising key points that shows you have heard.

Example of interrupting questions

- We have just 15 minutes, what's most important for us to concentrate on right now?
- I'm interested in your story and I also want you to get the most from this time – is this the best use of our time together?
- What can you distil from this incident/ this situation?
- What is the learning from what happened?
- And what do you want?
- What will you remember about this in ten years' time?

Seeking permission can be an effective way to interrupt whilst maintaining good rapport. It is defined as gaining the other person's permission to interrupt in order to ask a question or summarise. For example; "Can I reflect back to you what I am hearing you say?", "May I ask what you feel the priority here is?" Using permission seeking is a stylistic choice.

Activity 8:

In pairs: Practise the skills of stretching and interrupting to keep the coachee to topic.

Session Nine: Giving and Receiving Feedback

Definition of Feedback: Open and honest communication about what you notice and its possible impact in order to encourage reflection, new perspectives or as an act of acknowledgement.

In practice this means becoming skilled in:

- Giving information, not opinion or interpretation. Feedback needs to be clear, authentic, specific and timely (CAST).
- Naming what you see, hear and feel and what is emerging for you in that moment. This can sometimes be very helpful in gaining a balanced perspective on the issues and provides an opportunity for the coachee to understand how others might experience them and their behaviour. You might begin with: “I am noticing ...”, “I am feeling ...”, “I am wondering...”.
- Receiving feedback. This means being able to listen and suspend judgment, acknowledge the feedback and then reflect on what you might want to do differently.

Common pitfalls include:

- Starting the feedback with polite small talk.
- Using the ‘praise sandwich’, i.e. offering a compliment, the real (tough) message, followed by another compliment. A tough conversation should deliver its message simply and clearly and a complimentary conversation should be just that and separate.
- Making it easier to offer a tough message by interspersing supportive comments. This is for the comfort of the person giving the feedback, not that of the person receiving the message.
- Making assumptions about how the conversation will go. This can result in not really listening to what the person is saying when having the conversation.
- Delivering a rapid barrage of critical or tough comments without stopping to check the details with the other person.

In general, feedback for positive work is important as it encourages and motivates people to sustain and improve their performance. It helps people feel valued and can improve morale.

In coaching, another way of providing feedback is to acknowledge as it enables the validation of a person and their efforts without praising or denigrating the outcome.

Acknowledgment is about focusing on a quality in the person rather than focusing on what they achieved. For example, courage, clarity, doggedness, energy, humility, humour, willingness to learn, etc.

Useful phrases and examples to acknowledge:

- I would like to acknowledge your courage.
- Let's just mark your resolve in keeping going.
- I would like to salute your humility.
- It must have been challenging for you to deal with this issue with that person.
- I can tell that this has taken a lot of effort on your part.
- You have managed to keep smiling throughout this challenging situation.

Activity 9:

In pairs:

- Think of some feedback that you want to give a service user who has achieved their goal/s. "How do you feel?", "What are you noticing now that you've achieved this?"
- Think of some feedback that you would like to give a service user who has partly achieved their goal/s or has still to achieve their goal/s.

Session Ten: Pulling it All Together

Definition of a Coaching Framework: The terms 'framework' and 'model' are often used interchangeably. They provide a structure for a coaching session and an indication to the coach of key stages in the process. A multitude of coaching frameworks exist with the GROW model (Whitmore, 2002) perhaps the most well known. There are also frameworks designed specifically to guide an impromptu or 'in the moment' coaching conversation in response to a live situation, such as the RA-RA model (Grant, 2012, appendix 7).

Research has shown that although all models of coaching can be effective, it is the relationship that is central to achieving coaching outcomes (De Haan, 2011).

The REACH© Coaching Framework

This framework enables people to have a structured coaching conversation to encourage a person to hold themselves able and strive to meet their goals. It acts as a guide to the conversation rather than a prescriptive and rigid set of steps to follow.

Dynamic contracting – the **heart** of REACH©: making explicit the psychological contract, building rapport to create psychological safety, clarifying purpose and expectations. Questions might include:

- What do we expect from each other?
- What are the boundaries?
- What about confidentiality?
- How should we work when we have different views?
- What would a positive outcome be for you from our work together?
- What might press your buttons that we may need to pay attention to?
- What would you like to get from this conversation?
- What is most important to focus on today?

Reflect: an active process that utilises exquisite listening skills and creates an opportunity for connecting thoughts and feelings. Questions might include:

- What's currently happening?
- What's your own responsibility for what's happening?
- What have you learnt from this episode?
- If this kind of thing happened again, what would you do?
- What would you like more of or less of?

Explore: the use of powerful questions to test assumptions and elicit a range of options. Questions might include:

- What makes it a problem now?
- On a scale of 1-10, how important is this problem?
- On a scale of 1-10, how much energy do you have to find a solution?
- How might your values and beliefs impact the outcomes you want?
- What have you already tried in the way of solving it?
- What internal resources might be helpful?
- What external resources could you tap into?
- How do you feel?
- What options can you create?
- If you had your choice, what would you do?

Agree outcomes: helps to focus the conversation and agree the desired results. This part of the conversation is essential as it will help the person and you clarify what the person wants to achieve. Goal setting is an integral part of agreeing outcomes. Questions might include:

- What is the outcome you want?
- What represents a successful outcome for you?
- What must you leave here with today?

Commit to action: essential in the process as it helps determine the action that needs to be taken (by whom and by when). A frank or tough conversation may require skills to confront and challenge. You may also find the skills of permission seeking and intruding helpful. Questions might include:

- What will you do and by when?
- What is the first step?
- What can you do right now?
- What do you need from me?
- On a scale of 1-10 how committed are you to taking this action?

Hold to account: take responsibility for follow through and consequences for achieving or not achieving the outcomes. Questions might include:

- How might you feel when you have accomplished your goal(s)?
- If you don't succeed, what will the consequences be for you?
- What would you like from me to help you hold yourself to account?
- How will you review your progress?

Further examples of questions can be found in Appendix 8 and 9.

Appendix 1: Self-assessment

1. Understanding Self: Self-awareness is crucial and core for managing yourself when having coaching conversations. We want you to evidence this in your coaching conversations through verbal and non-verbal communication.					
Criteria for competency		Confident	Not yet confident	My personal development needs	
(1)	Behaves in a manner that facilitates the mentoring/coaching process				
(2)	Manages issues of diversity in their mentoring/coaching practice				
(3)	Describes their own values, beliefs and attitudes that guide their mentoring/coaching practice				
(4)	Behaves in alignment with their values and beliefs				
2. Commitment to Self-Development: Having coaching conversations requires ongoing learning. We want you to demonstrate this in reflective exercises and your active participation in the programme.					
Criteria for competency		Confident	Not yet Confident	My personal development needs	
(5)	Practises and evaluates their mentoring/coaching skills				
3. Managing the Contract: We want you to demonstrate the ability to manage a coaching style conversation based on respect and equity, be able to hold appropriate personal and work boundaries and bring the coaching conversation to a close. We also expect you to work within the Global Code of ethics and be clear about the parameters of confidentiality.					
Criteria for competency		Confident	Not yet Confident	My personal development needs	
(6)	Explains their role in relation to the client				
(7)	Explains the benefits of mentoring/coaching both for the client and in relation to the client's context				
(8)	Agrees appropriate levels of both confidentiality and communication to others				

(9)	Manages the conclusion of the conversation			
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4. Building the Relationship: We want you to demonstrate your ability to listen exquisitely, acknowledge, use appropriate language and non-verbal communication.

Criteria for competency		Confident	Not yet Confident	My personal development needs
(10)	Treats all people with respect and maintains client's dignity			
(11)	Describes and applies at least one method of building rapport			
(12)	Uses language appropriate to the client			
(13)	Develops trust through keeping commitments and being non-judgemental with client			

5. Enabling Insight and Learning: We want you to demonstrate the ability to listen exquisitely, ask powerful questions and offer stretch and challenge. This requires awareness of the difference between mentoring, directing and coaching and an ability to adapt according to circumstance.

Criteria for competency		Confident	Not yet Confident	My personal development needs
(14)	Demonstrates belief in helping others to develop			
(15)	Believes that others learn best for themselves			
(16)	Checks thoroughly for understanding			
(17)	Uses an active listening style			
(18)	Explains the principles of questioning and at least one framework			
(19)	Offers advice and ideas only when appropriate			

6. Action and Outcome Orientation: We want you to enable someone to set and strive to achieve their goals using the REACH framework offered in the programme. This includes demonstrating your ability to give feedback and enable someone to commit to an action.

Criteria for competency		Confident	Not yet Confident	My personal development needs
(20)	Assists client to clarify and review their desired outcomes and set appropriate goals			
(21)	Ensures congruence between client's goals and their context			
(22)	Explores a range of options for achieving the goals			
(23)	Ensures the client chooses solutions			
(24)	Keeps appropriate notes			
(25)	Reviews progress and learning			
(26)	Ensures the client leaves the session enabled to use new ideas and learning			

7. Use of Models and Techniques: We want you to demonstrate the use of the REACH© framework and experiment with at least one of the other models offered on the programme.

Criteria for competency		Confident	Not yet Confident	My personal development needs
(27)	Bases approach on a model or framework of mentoring/coaching			

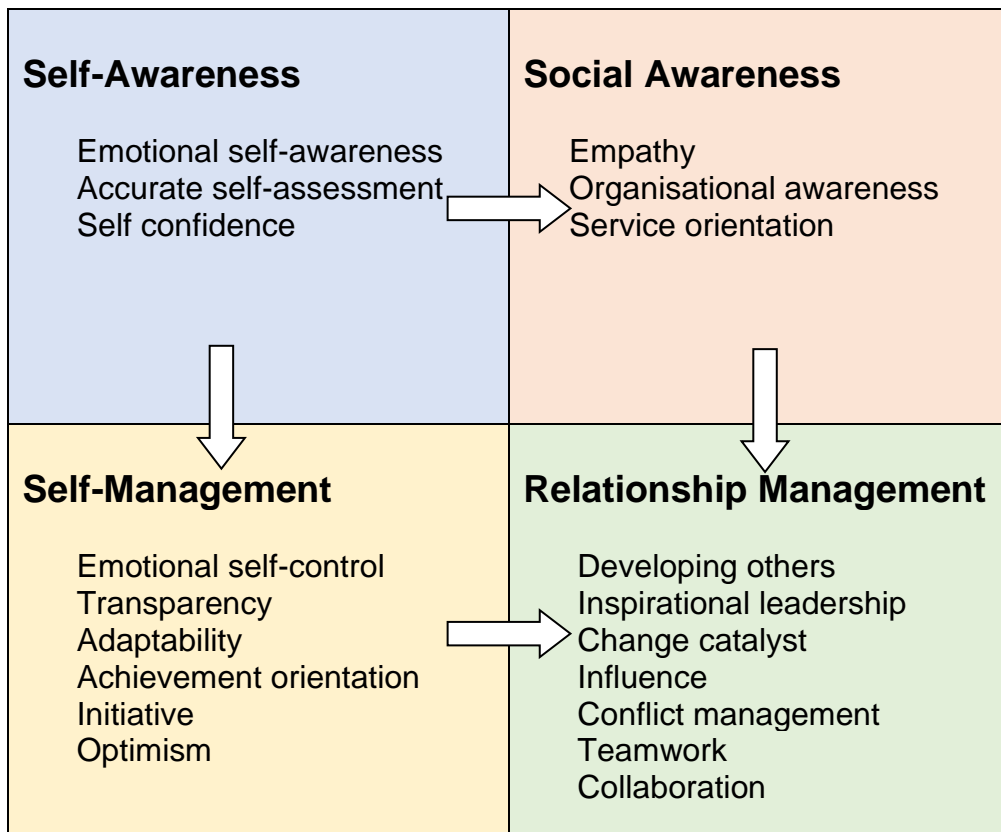
8. Evaluation: We want you to demonstrate your ability to enable someone to review their progress, to seek feedback for yourself and to think about the actions you need to take which links back to competency 1 and 2.

Criteria for competency		Confident	Not yet Confident	My personal development needs
(29)	Evaluates outcomes with client (and stakeholders if relevant)			
(29)	Monitors and reflects on the effectiveness of the whole process			
(30)	Requests feedback from client on mentoring/coaching			

(31)	Receives and accepts feedback appropriately			
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Appendix 2: Coaching with Emotional Intelligence

Emotional Intelligence is fundamental to working with a coaching style. The key elements of Emotional Intelligence are outlined in Daniel Goleman's (1998) Working with Emotional Intelligence. The diagram below invites the user to pay attention to both internal and external factors when coaching.



Adapted from Goleman (1998)

Appendix 3: Examples of different conversation styles

A leader, manager or supervisor may be required to work with a range of styles. Below is an example of how a supervision conversation might sound if conducted using a directive, mentoring or coaching style.

Scenario:

As a service manager you notice that a ward is overspent on two consecutive months and you discuss this situation with the ward team leader in supervision:

A **directive** style conversation might be conducted as follows:

Manager I would like to use part of this session to have a conversation with you about your overspend.

Team leader We have had unexpected sickness and have required more agency.

Manager Ok, I understand the situation. This is what I want you to do.

A **mentoring** style conversation might be conducted as follows:

Manager I am wondering if it would be helpful if we talked through how you might handle this situation differently. I have considerable experience of budget management which may be useful to you.

Team leader Yes that would be helpful, as I have not had to deal with this before

Manager In my experience it may be helpful to

A **coaching** style conversation might be conducted as follows:

Manager I would like to have a conversation with you about your overspend.

Team leader We have had unexpected sickness and have required more agency.

Manager I understand the situation, what are your ideas for managing this?
What have you already tried?
How soon do you envisage being back within budget?
How will you monitor the situation?
What will you commit to doing now?
In what way can I be helpful to you?

Appendix 4: Observer Checklist

When in the role of observer, what did you notice about the coach and coachee?

- Non verbal communication (posture, gesture, eye movements).
- Verbal communication (tone of voice, pitch, pace and speech).
- Active contracting and re-contracting.
- Rapport (matching/mismatching, verbal and non verbal communication).
- Level of engagement.
- Extent to which questions have engendered reflection and acknowledged values, beliefs and internal resources.
- Extent to which goal setting and goal striving was achieved.

Appendix 5: Intrinsic and Extrinsic Motivation

To be motivated means to be moved to do something. A person who is energised or activated toward an end is considered to be motivated.

People not only have different amounts of motivation, but also different ways of being motivated. Different ways of being motivated is linked to a person's underlying attitudes, values and goals that give rise to action – that is, it concerns the why of actions. We distinguish between different types of motivation based on the different reasons or goals that give rise to an action. The most basic distinction is between intrinsic and extrinsic motivation.

Intrinsic Motivation

Intrinsic motivation involves engaging in behaviour because it is personally rewarding and/ or is aligned with our values. An individual performs an activity for its own sake rather than the desire for some external reward.

Examples of actions that are the result of intrinsic motivation include:

- Participating in a sport because you find the activity enjoyable.
- Solving a word puzzle because you find the challenge fun and exciting.
- Playing a game because you find it exciting.

Extrinsic Motivation

Extrinsic motivation involves engaging in behaviour that is driven by external rewards and/ or avoidance. External rewards can induce interest and participation in something in which the individual had no initial interest. It can also maintain a desired elicited behaviour.

Examples of actions that are the result of extrinsic motivation include:

- Cleaning the house because people comment on how nice your house looks.
- Going to work because you get paid for it.
- Going to the same supermarket because you receive points or rewards.

The primary difference between the two types of motivation is that extrinsic motivation arises from outside of the individual while intrinsic motivation arises from within.

Ryan & Deci (2000)

Appendix 6: Preparation for Frank or Tough Conversations

The following conversation should take no more than 90 seconds.

1. Start by briefly outlining your understanding of the problem/ issue. Select a specific example that illustrates the behaviour or situation you want to change.
2. Clarify how you feel about this problem/ issue.
3. Briefly state the consequences of not making a change i.e., what is at stake (for you, for them, for others, for the team or for the organisation).
4. Identify your part in this situation and your commitment to support the change.
5. State your wish to resolve this problem/ issue.
6. Invite the other person's thoughts on your comments so far.

In the conversation that follows, work together to agree the steps required to resolve the matter with timeframes for review.

Adapted from the framework for Fierce Conversations (Scott, 2002) and Vital Conversations (Grimsley, 2010)

Appendix 7: The RA-RA Coaching Model

The RA-RA Coaching Model

(Anthony M. Grant, 2012)

In-the-moment coaching

Corridor coaching on-the-run



Recognise: Key point: Recognise an opportunity to coach.

Check: “Is this a coaching opportunity?”

Check: “Will a five minute time investment now pay off later?”

Ask: Key point: Ask not tell. Ask permission to coach them.

Sample questions (but use phrasing that works for you- and memorise taglines):

- “That’s a great question. Can we explore that and see what come up?”
- “Have you got a minute? Can I ask you a couple of questions?”
- “Can I ask a difficult question here?”
- “What are your thoughts on that?”

Reframe: Key point: Reframe for solutions. Take a different perspective.

Sample question (what else could you say?):

- “Let’s look at this from a different perspective”
- “What are we missing here?”
- “What other options do we have?”
- “How else could we think about this?”

Agree: Key point: Agree on action steps.

Sample questions (ensure that they take responsibility for action):

- “What’s different now we’ve talked about this?”
- “What’s your insight from this conversation?”
- “How has your thinking changed?”
- “What could you do to move this forward?”
- “What are your next steps?”
- “What are you going to do first?”
- “How do you feel about this now?”
- “So, what I’m hearing is that you are going to do ..., is that right?”

Appendix 8: Generic List of Powerful Questions

- If I were being effective as a clinician, how would you see me work with you?
- What has been your best and worst experience of using these services?
- What would be the best way to confront difficulties?
- What's new/the latest/the update?
- What's your own responsibility for what's happening?
- What have you learnt from this episode?
- If this kind of thing happened again, what would you do?
- What would you like more of or less of?
- What kind of picture do you have right now?
- What makes it a problem now?
- On a scale of 1-10, how important is this issue?
- On a scale of 1-10, how much energy do you have to find a solution?
- Who actually owns this problem?
- What have you already tried in the way of solving it?
- What options can you create?
- If you had your choice, what would you do?
- What will happen if you do, and what will happen if you don't?
- What resources do you need to help you decide?
- What's working for you now?
- What are you feeling right now?
- What are you feeling about this situation, dilemma etc?
- What will you do and by when?
- How will I know you have done it?
- What is the measure of success?
- What is the first step?
- What can you do right now?
- What do you need from me?
- How do you feel?
- On a scale of 1-10 how committed are you to taking this action?
- If you don't succeed what will the consequences be for you?
- How will you hold yourself to account?
- How do you want me to hold you to account?
- How might your values and beliefs impact the outcomes you want?
- What personal resources could you use to help you?
- What external resources could you tap into?

Appendix 9: Generic Clusters of Powerful Questions

Checking in

- On a scale of 1-10:
- How important is this issue?
- How much energy do you have to find a solution?
- What are you feeling right now?

Finding solutions

- What would you like more of, less of?
- Who actually owns this problem?
- If you had your choice what would you do?

Distilling learning

- What's the best way to confront this?
- What's your responsibility for what's happening?
- If this happened again, what would you do?

Being resourceful

- What have you already tried in the way of solving it?
- What's working for you now?
- What options can you create?

Taking action

- What will you do and by when?
- How will you know you have done it?
- What can you do right now?

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