

# REFOCUS Coaching Conversations for Recovery, 2<sup>nd</sup> edition

## Trainer Manual



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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.

### **Why are Coaching Conversations Helpful?**

Coaching conversations can help clarify what service users want and encourage responsibility and accountability for achieving goals. Using the skills and techniques can also help clinical and support staff reconnect with their core clinical skills and realise that they do not need to be the automatic problem solver for service users or indeed junior staff. Clinical and support staff become more conscious about the mode within which they are working such as using a coaching or directing approach and this helps them think of service users as more resourceful.

Developing the skills to have a coaching style conversation has other additional benefits as it helps staff work 'inside out'. In busy work environments it is easy to forget to check assumptions, listen to different perspectives, pace conversations, ask open questions, be aware of and acknowledge different values and beliefs and develop a 'power with' not 'power over' relationship. A coaching conversation encourages staff to suspend their judgement, recognise patient treatment values and beliefs, and have more resourceful elegant conversations.

These skills can be equally used by staff in supervisory positions and can help to create a work culture in which people are held able and accountable for decisions and working practices. A robust supervision system, valued by staff can help them develop their coaching conversational practice as part of their overall repertoire of skills.

### **Using this Manual**

You will need three manuals.

This document is the coaching trainer manual. The reference is:

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

It is used with the training manual for mental health staff:

Grey B, Nahabedian N, Leamy M, Slade M (2023) *REFOCUS Coaching Conversations for Recovery. Participant 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](http://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.

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## Guidelines for Using this Trainer Manual

### Guidelines for Participating Teams:

This training involves team-based experiential training on coaching skills for recovery using the REACH© framework and it:

1. Is for organisations that want to develop and embed a recovery focused culture.
2. Is a team intervention for clinical and support staff who want to use a coaching style in their work.
3. Acknowledges that clinical teams vary in size. This training package was developed for teams of 12-18. Trainers would need to agree with larger teams how the delivery is organised.
4. Assumes that clinical teams have the support of leaders and managers to transfer and sustain their learning back in the workplace.
5. Assumes that clinical and support staff have appropriate supervision and suitable reflective practice forums to enable them to embed their learning in practice.

**Managing clinical risk:** There may be times when having a coaching conversation is not the right approach. To manage clinical risk - refer to your local clinical risk policy.

### Guidelines for Trainers:

This Trainer Manual assumes:

1. Trainers are skilled coaches.
2. Trainers have the ability to facilitate group discussions, modify timings of the day as appropriate, encourage active participant engagement and empower participants to make realistic decisions for embedding learning.
3. One trainer would deliver the programme for each group of 12-18 participants.
4. Two trainers would be required for larger groups up to a maximum of 24. When two trainers work together only one needs to be an experienced coach. The second trainer may be a clinician or a service user who has completed a coaching programme and has the skills to work in the role of a trainer.

### Learning Outcomes:

By the end of the programme participants will be able to:

1. Demonstrate how a coaching approach supports the implementation of recovery focused practice i.e., understanding values and treatment preferences, assessing strengths and supporting goal striving.
2. Demonstrate as a team how they will work differently and identify support required from the organisation to help them sustain changes in practice.
3. Demonstrate the effective core competencies required for working effectively with a coaching style.
4. Recognise when it is appropriate or not to work with a coaching approach in a clinical setting.
5. Use the REACH© coaching model to have effective coaching style conversations, hold to account and creatively achieve agreed outcomes.

**Participant Numbers:**

The programme is designed for 12-18 participants with one trainer. For larger teams up to a maximum of 24, two trainers are recommended. The benefit of two trainers is that there is greater capacity to give attention and feedback to participants in the practical exercises.

**Rooms and Equipment Required:**

- A main room with audio visual set up, flip chart and pens suitable for 12-18 participants plus trainers.
- A breakout room for a group of 6-8 participants plus a trainer for small group work.

**Resources:**

A number of useful resources and references are provided at the back of the Trainer Manual.

**Course Materials:**

Each participant will be given a copy of the REFOCUS Coaching Conversations for Recovery Participant Guide. Each participant will also be provided with the link [www.researchintorecovery.com/refocus](http://www.researchintorecovery.com/refocus) for accessing:

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

Copies of the REFOCUS Manual will be available for reference by participants during the programme.

**Pre-Course Preparation and Self-Assessment Material:**

A pre-course preparation and self-assessment sheet (resource 1) should be provided to participants in advance of attending the programme. This resource references 'Emotional Intelligence' as outlined in 'Working with Emotional Intelligence' (Goleman, 1998).

## 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.

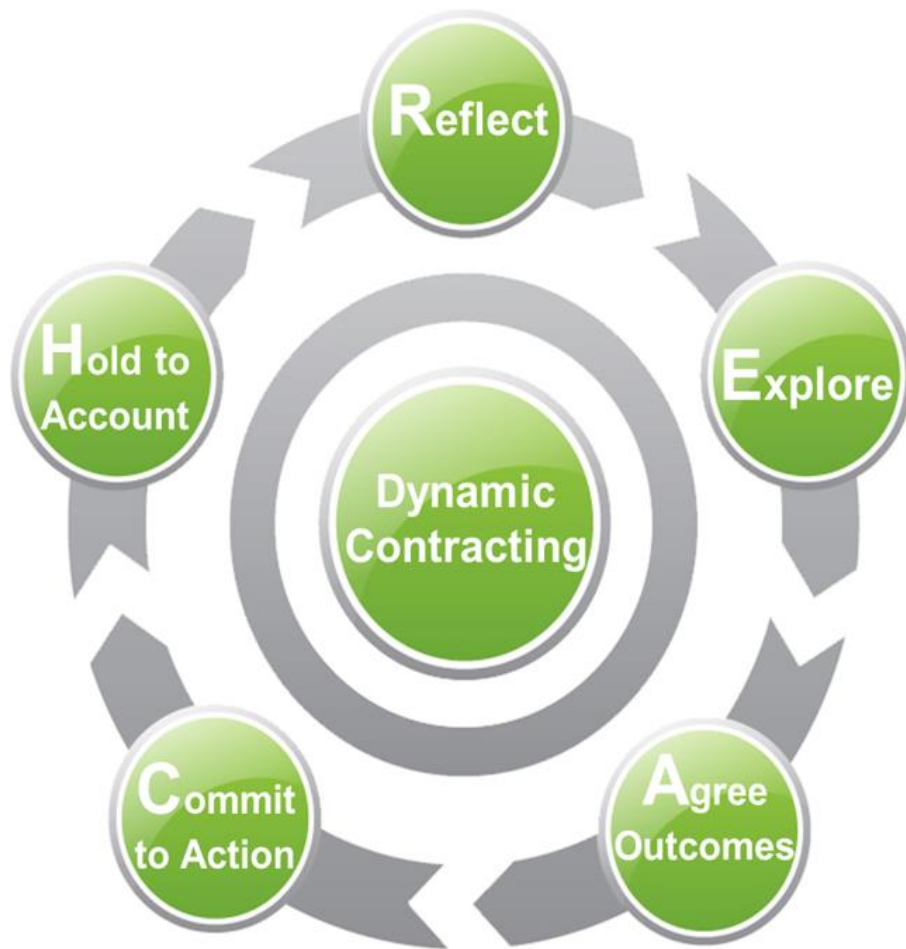
The REACH© framework emphasises accountability more explicitly than other frameworks and models and involves connecting the head (thinking), heart (feeling) and hand (doing) to achieve identified goals. Making expectations and agreements explicit from the outset is key to effective health coaching conversations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

## Introductions and contracting

### Aim:

- To address essential housekeeping matters.
- To agree the parameters of the programme and introduce participants and trainer/s.
- To establish a working agreement or 'dynamic contract' between participants and trainers that is regularly revisited and updated.

### Learning outcomes:

Participants will be able to:

- Understand what the programme is aiming to achieve.
- Experience dynamic contracting in a group setting.

### Trainer Notes:

#### Housekeeping:

- Trainer/s introduces themselves.
- Confirm with participants the finish time and negotiate if participants need to leave early e.g., because of childcare.
- Check fire safety requirements for the day and confirm location of the toilets.
- Introduce and display timetable for the day
- Request participants sign in on a register provided.

#### Introductions:

- Introduce the overall learning outcomes of the programme.
- Ask participants to introduce themselves, name, role, length of time on the ward/unit/team, expectations of the programme. Offer a simple exercise to help people to get to know one another.
- Agree working contract for the programme of the day to include confidentiality, honesty, suspending judgement, committing to engaging during the day. The trainers should also explain what the group might notice them doing e.g., keeping them to task, moving the conversations on, giving 'in the moment' feedback. This part of the introduction models dynamic contracting which is described in more detail.
- Invite reflection and discussion on how cultural differences will be worked with sensitively, emphasising that what is appropriate for one cultural group may be less acceptable to another.
- Invite the group to consider the elements of the wider environment within which they work and key drivers of relevant national and local contexts.

Explain that this contract will be regularly revisited and after the session which focuses on dynamic contracting.

## Session One: Self-assessment and self-management

**Aims:**

- To create conscious awareness of how we communicate verbally and non-verbally and the impact this has on relationships with others.
- To demonstrate the impact of paying attention in the present moment, without judgement.
- To demonstrate alignment of intent with behaviour.

**Learning Outcomes:**

Participants will be able to:

- Identify the important components of verbal and non-verbal communication.
- Modify their responses to develop rapport.
- Demonstrate a congruent working style.

**Trainer Notes:**

- Introduce the research about non-verbal and verbal communication (Mehrabian, 1971) and explore the importance of congruent non-verbal and verbal communication.
- Introduce, demonstrate and practise matching and mismatching body language.
- Encourage participants to explore the impact of congruent working styles including the importance of unconditional positive regard and presence.

**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 (resource 1).

**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

### Aims:

- To introduce participants to the underpinning principles and components of using a coaching style in a clinical setting.
- To convey the differences between coaching, mentoring, directing and therapy and the value of using all these approaches.

### Learning Outcomes:

Participants will be able to:

- Identify the core practical components required for effective coaching conversations.
- Differentiate between coaching, mentoring, directing and therapy.
- Recognise when they are directing, coaching or mentoring.
- Flex their approach depending on the needs of the service user, the situation and the level of risk.

### Trainer Notes:

- Encourage participants to share their understanding of coaching in practice and how they can draw upon their existing expertise to develop a coaching style.
- Briefly introduce the differences between coaching, mentoring, directing and therapy. Explain that each style has its merits and during the programme there will be an opportunity to practise using directing, mentoring and coaching styles and differentiating between them.

### Activity 2:

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

## 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.

### Aims:

- To introduce the concept of dynamic contracting.
- To encourage participants to use contracting in their work.
- To encourage participants to reflect on their own beliefs and values and how they check assumptions.

### Learning Outcomes:

Participants will be able to:

- Understand the concept of dynamic contracting.
- Identify where they already use dynamic contracting in their work.
- Use dynamic contracting to agree how they are going to work together in the future.

### Trainer Notes:

- Introduce the concept of dynamic contracting and link this to the contracting undertaken in the session.
- Psychological contracting is at the heart of good communication and relationships.
- Dynamic contracts need to be revisited regularly and renegotiated as necessary.
- Ask participants for examples of how they use contracting in their clinical work.
- Emphasise the value of holding these conversations explicitly.
- Ask participants to think about their core beliefs and values and invite them to notice how they test the assumptions they make.
- Revisit the importance of working sensitively with diversity and cultural differences.

### 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.

**Aim:**

- To understand and practise the use of exquisite listening skills and appreciate the value of silence.

**Learning Outcomes:**

Participants will be able to:

- Identify the components of exquisite listening - respect, checking assumptions (Schein,1999) acknowledging, valuing silence, demonstrating unconditional positive regard (Rogers, 1961).
- Demonstrate skill in listening exquisitely.
- Demonstrate skill in offering acknowledgement.

**Trainer Notes:**

- Explore the meaning of exquisite listening as described in the Participants Manual.
- Differentiate between level one and two listening.
- Demonstrate the difference between level one and two listening.

**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.

**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.

### Aims:

- To introduce the notion of powerful questions.
- To explore participants' experience of receiving questions.
- To raise awareness of pitfalls in questioning.

### Learning Outcomes:

Participants will be able to:

- Use questions powerfully in a coaching conversation.
- Understand the drawbacks of using multiple, unfocused, undermining questions, and 'advice' disguised as questions.
- Understand the link between exquisite listening and powerful questions in effective coaching conversations.

### Trainer Notes:

- Introduce the idea of powerful questions and how questions can be received differently by individuals. Encourage a conversation about the importance of context such as cultural context both individual and team/organisation culture.
- Explore the questions to avoid and use sparingly.
- Reflect on how the importance of pace and timing influences the impact of the coaching questions offered.
- Generate examples from the group of different questions.

### 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. Resource 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.

### Aims:

- To identify the value of realistic goal setting in a coaching conversation.
- To reflect on what the role of the clinician or support staff member is in goal setting with a service user during a coaching conversation.
- To recognise the importance of values and beliefs in the context of goal setting and goal striving.

### Learning Outcomes:

Participants will be able to:

- Use dynamic contracting, exquisite listening and powerful questions to work with a service user to help them develop realistic goals and milestones.
- Understand the relationship between goal setting and goal striving and the importance of understanding a person's beliefs and integrating their values in this process.
- Understand the importance of helping a service user make best use of their strengths when striving for their goals.

### Trainer Notes:

- Introduce the concept of goal setting and goal striving.
- Encourage a discussion about how you would elicit an understanding of a person's belief, values and strengths and what happens when someone encounters a setback.
- Reflect with the group about the need for dynamic contracting, exquisite listening, and powerful questioning.



### **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.

### Aims:

- To explore how challenging conversations can help a person become more resourceful and enable them to achieve their goals.
- To recognise the importance of giving and receiving timely feedback.

### Learning Outcomes:

Participants will be able to:

- Confront problems early.
- Give clear, honest, respectful feedback.
- Demonstrate confidence, skills, and resilience in having challenging conversations.
- Demonstrate skills of seeking permission and intruding during a coaching conversation to help keep the focus.

### Trainer Notes:

- Generate a real-life scenario with participants about a situation that they are struggling to address with a service user.
- Ask for a volunteer and demonstrate holding a frank or tough conversation
- Debrief the scenario and invite feedback from the group.
- Explain the concepts of seeking permission and intruding. The purpose of these skills is to help the person with whom you are having the conversation keep focused.

### Activity 7:

In pairs: Practise confronting and challenging skills:

- Use the framework in resource 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 'airtime' 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.

### **Aims:**

- To develop skills that help a service user stay focused during the conversation so that it is most productive for them.
- To develop the skill of asking permission before offering a perspective or observation that might be helpful to the other person and respectfully withholding one's observations or comments if the other person would prefer not to receive them.
- To develop the skill of intruding respectfully that the conversation stays focused.

### **Learning Outcomes:**

Participants will be able to:

- Recognise in a timely way when the conversation is going "off track".
- Demonstrate the skills to intrude in order that the service user reconnects with their intention for having the conversation that leads to action.
- Identify values and beliefs both expressed and observed to other's body language.

### **Trainer Notes:**

- Explain the concept of seeking permission and intruding. The overall purpose is to help the person with whom you are having the conversation keep focused.
- Generate a scenario, ask for a volunteer and demonstrate the skills.

### **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.

### Aims:

- To gain an understanding of what it means to give and receive effective feedback.
- To experience giving and receiving feedback in a coaching conversation.

### Learning Outcomes:

Participants will be able to:

- Give and receive feedback skilfully in a coaching conversation.
- Recognise what is involved in giving skilful feedback and the consequences of giving feedback poorly.
- Understand the value of timely feedback and how this will help a service user strive towards their goals and hold her/himself to account.

### Trainer Notes:

- Facilitate a conversation about giving and receiving feedback. Ask for examples of participants' experiences of feedback and what they found helpful and unhelpful.
- Explore the pros and cons of timely feedback and the requisite skills and approach required i.e., use of exquisite listening, language, noticing non-verbal communication and taking a neutral position.
- Refer to the earlier skills for holding frank and tough and reflect on the difference between giving 'on the spot feedback' and 'needing more time to prepare for tough feedback'.
- Demonstrate giving and receiving feedback.
- Introduce and demonstrate the skill of acknowledgement i.e., validating another person's experience and efforts without commenting on the quality of the performance.

### 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, 2008, resource 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).

### **Aims:**

- To integrate components of coaching in a practical coaching conversation exercise.
- To use REACH© as a coaching model to structure a coaching conversation.
- To introduce other coaching models that participants might find useful.

### **Learning Outcomes:**

Participants will be able to:

- Revisit their self-assessment completed prior to the programme and note their learning about their self-awareness and self-management.
- Hold a confident coaching conversation using a range of coaching competencies.
- Be more confident in their ability to pay attention to what is happening in the moment in a coaching conversation.
- Demonstrate they can apply different coaching models.
- Evidence awareness of which coaching style is most appropriate to use with the person in a coaching conversation.

### **Trainer Notes:**

- Revisit the REACH© model in detail, drawing examples from participants' experience.
- Reinforce how we introduce questions for each component of the model.
- Introduce other coaching models and facilitate a conversation about how they might be applied in coaching conversations.

## 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?

**R**eflect: 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?

**E**xplore: 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?

**A**gree 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?

**C**ommit 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?

**H**old 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 resource 8 and 9.

## Resource 1: Self-assessment

<b>1. Understanding Self:</b> 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				
<b>2. Commitment to Self-Development:</b> 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				
<b>3. Managing the Contract:</b> 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				



**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
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(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.

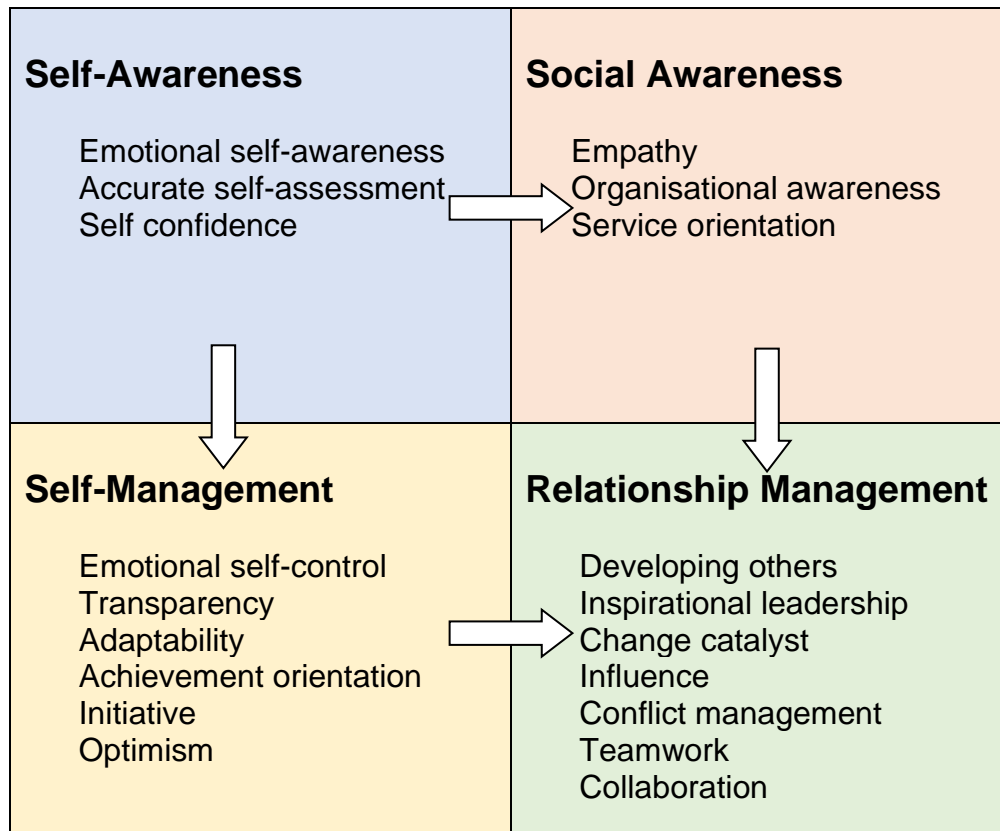
Criteria for competency		Confident	Not yet Confident	My personal development needs
(27)	Bases approach on a model or framework of mentoring/coaching			

**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			

## Resource 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)

### Resource 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?

## Resource 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.

## Resource 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)

## Resource 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)

## Resource 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?"



## Resource 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?

## Resource 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?

## Suggested timetable for 1-day delivery

<b>Time</b>	<b>Activity</b>
Pre-course	<i>Activity 1a (resource 1)</i>
09:00	Welcomes, introductions and contracting for the day
09:15	Programme outcomes and objectives
09:30	Session 1: Self-assessment and self-management
09:50	<i>Activity 1b</i>
10:00	<i>Activity 2</i>
10:15	Session 2: Directing, mentoring and coaching
10:20	Demonstration
10:40	Session 3: Dynamic contracting
10:50	<i>Activity 3</i>
11:05	Group feedback
<b>11:15</b>	<b>BREAK</b>
11:30	Session 4: Exquisite listening
11:40	<i>Activity 4a</i>
11:55	<i>Activity 4b</i>
12:10	Group feedback
12:35	Session 5: Powerful questions
12:50	<i>Activity 5</i>
<b>13:35</b>	<b>LUNCH</b>
14:15	Session 6: Setting and achieving goals
14:30	<i>Activity 6</i>
15:00	Group feedback
15:10	Session 7: Stretching and challenging
15:15	Session 8: Interrupting and permission seeking
<b>15:20</b>	<b>BREAK</b>
15:30	<i>Activity 7</i>
15:50	Session 9: Giving and receiving feedback
16:00	Pulling it all together with long coaching session
16:50	Final Questions
<b>17:00</b>	<b>CLOSE</b>

## Suggested timetable for 2-day delivery

### Day 1

Time	Activity
Pre-course	<i>Activity 1a (resource 1)</i>
09:30	Welcomes, introductions and contracting for the day
10:00	Programme outcomes and objectives
10:20	Session 1: Self-assessment and self-management
09:50	<i>Activity 1b</i>
10:05	<i>Activity 2</i>
10:20	Group feedback
10:35	Session 2: Directing, mentoring and coaching
10:40	Demonstration
10:50	Session 3: Dynamic contracting
<b>11:05</b>	<b>BREAK</b>
11:20	<i>Activity 3</i>
11:35	Group feedback
11:45	Session 4: Exquisite listening
12:00	<i>Activity 4a</i>
12:15	Group feedback
12:25	<i>Activity 4b</i>
12:50	Group feedback
<b>13:00</b>	<b>LUNCH</b>
13:50	Session 5: Powerful questions
14:10	<i>Activity 5</i>
<b>15:10</b>	<b>BREAK</b>
15:30	Group feedback
15:45	Pulling together day 1
16:00	Overnight reflection set up <ul style="list-style-type: none"> <li>- What has resonated with you most today?</li> <li>- What opportunities are there to take these coaching skills into your clinical practice?</li> </ul>
16:15	Questions
<b>16:30</b>	<b>CLOSE</b>

## Day 2

<b>Time</b>	<b>Activity</b>
Pre-course	Overnight reflections
09:30	Welcomes and re-contracting
09:45	Sharing reflections
10:00	Group feedback
10:15	Session 6: Setting and achieving goals
10:30	<i>Activity 6</i>
11:15	Group feedback
<b>11:30</b>	<b>BREAK</b>
11:45	Session 7: Stretching and challenging
11:50	<i>Activity 7</i>
12:15	Group feedback
<b>12:30</b>	<b>LUNCH</b>
13:45	Session 8: Interrupting and permission seeking
14:00	<i>Activity 8</i>
14:15	Session 9: Giving and receiving feedback
14:30	<i>Activity 9</i>
<b>14:45</b>	<b>BREAK</b>
15:00	Session 10: Pulling it all together with long coaching session
16:00	Group feedback
16:15	Final Questions
<b>16:30</b>	<b>CLOSE</b>

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