

I DDA Developmental
Disabilities Administration

Peer Coaching Facilitator's Guide

Instructions & Materials



The Peer Coaching Training was developed as a result of the following (RCW 74.39A.331 On the Job Training and WACs 388-101-3258, 3240, 3302):

RCW 74.39A.331 Long-term care workers shall be offered on-the-job training or peer mentorship for at least one hour per week in the first ninety days of work from a long-term care worker who has completed at least twelve hours of mentor training and is mentoring no more than ten other workers at any given time. This requirement applies to long-term care workers who begin work on or after July 1, 2012, except that it does not apply to long-term care workers employed by community residential service businesses until January 1, 2016.

WAC 388-101-3258 The service provider must ensure that individuals identified under WAC [388-101-3302](#) have met the training requirements under WAC [388-101-3260](#) through [388-101-3300](#).

This law and the following rules speak to on the job training in Assisted Living Facilities but fall under the Long Term Care Worker rules as well. Agencies are to make on the job training (OJT) available in case a worker requests this assistance.

From the Community Residential Service (RCS) perspective, on the job training varies significantly from an Assisted Living Facility, however, the law requires this training be available. RCS has addressed this requirement by developing a Peer Coaching program.

In other portions of the WAC, Peer Coaching or Mentoring must be led by a qualified instructor, one who has attended 12 hours of coaching classes. With a Stakeholder workgroup, the Developmental Disabilities Administration (DDA) determined that the 12 hours could be Continuing Education hours and that the current Peer Coaching could be improved with structure and training.

Purpose

This course is intended for lead Community Residential Service business staff to learn methods and practices for effectively coaching new staff. This course may be taught by any *approved instructor with qualifications to teach continuing education*.

Course Code: CED-1002 CEs approved: 12 hours

The Facilitator's Guide was developed to assist in the execution of the Peer Coaching Training. Facilitators will find materials and instructions to aid in the training.

Agenda/Outline

Day 1 - Classroom

I. What is Peer Coaching?

- A. Definition, benefits

II. What is the role of a coach?

- A. Who should be a coach
- B. Attributes
- C. Role & Expectations

III. Coaching Basics

- A. Effective Coaching
- B. Learn through experience
- C. Guide to action

IV. Coaching Cycle

- A. Assess Focus Areas
- B. Set Goals
 - i. SMART goals
- C. Create Action Plan
- D. Implement
- E. Reflect

V. Tools

- A. Snapshot
- B. Checklist
- C. Reflection sheet
- D. Agenda

VI. Best Practices

- A. General
- B. No one way to coach
- C. Constructive feedback
- D. Encouragement & Recognition

On the Job (practice in the field)

- I. Practice with Checklist
- II. Create/review Snapshot
- III. Coach/demonstrate learning

*Day 2 (classroom training is optional)

- I. Review and discuss on the job experience
- II. Evaluations and Certificates

*See instructions for Day 2 on Page 7

Guide

This manual is to assist you in preparing for the Day 1 classroom training. Ensure you are prepared – allow enough time to gather materials, make copies, and set up the room. Having an organized space and materials ready will make a big difference in the training delivery.

The PowerPoint presentation comes with notes and instructions in each slide to help you facilitate during the Day 1 classroom training (you may add your own). You can print these out slide by slide with the notes, view from the Presenter’s screen during the training if you have access to that view, or employ whatever method works for you.

Materials

Master documents: <https://www.dshs.wa.gov/node/10621/>

Classroom Prep	
Easels and chart paper and/or large sticky paper	
Markers & Pens	
Color Blocks (for activity)	
Printout of PPT with blank notes section for each participant (or other format for notes)	
Copies of handouts listed below	
Sign In Sheet	
Handouts	Corresponding PPT Slide
Activity: Block Building Instructions	Slide #11: <i>Activity Part 1</i>
Listen to Understand NS Scenario Cards	Slide #12: <i>Guide to Action</i>
Feedback Activity Cards	Slide #34: <i>Giving Feedback</i>
Snapshot	Slide #27: <i>Snapshot</i>
Coaching Checklist Objectives	Slide #28: <i>Coaching Checklist</i>
Coaching Checklist (19 pages – separate doc)	Slide #28/29: <i>Coaching Checklist/ Activity</i>
Coaching Agenda	Slide #19/22: <i>Coaching Cycle: Focused Goals, Implement</i> Slide #36: <i>Activity – Putting It All Together</i>
Coaching Scenarios	Slide #36: <i>Activity – Putting It All Together</i>
Reflection Activity Sheet	Slide #36: <i>Activity – Putting It All Together</i>
Evaluation (Day 1 or Day 2)	Slide #42: <i>Evaluation</i>
On the Job Packet	
Peer Coaching Guide	It is recommended you create a packet for each participant and hand it out at the end of the training. Expectations should be clearly explained – review what each document is for, and what coaches should return with if there is a Day 2.
Snapshot	
Coaching Objectives	
Checklist – should take the one from class	
Action Plan	

Agenda	
Reflection sheet	

NOTE:

- Before you begin the classroom training, you must have a computer/projector (for the PowerPoint presentation), and internet connection (if streaming videos).
- If you alter the slide presentation, the handouts may not correspond with the slide numbers below (the title should remain the same)
- The amount of materials needed will depend on your class size. It is recommended you make extra copies of the handouts. Consider double sided printing.
- For some documents, you will create one copy for use during classroom exercises, and a second copy to include in the On the Job Packet.
- You may choose to compile the handouts to be used throughout the training into a packet to distribute to each participant at the beginning of the class (or have out on the tables), or you can provide each individual handout to participants at the commencement of the exercise/activity.

Objectives, Expectations & Outcomes

OBJECTIVES:

1. Provide senior, experienced staff with methods and best practices for transferring information regarding Individuals supported by your agency to New Staff (NS).
2. Enhance the training experience to help motivate, develop, and retain staff.
3. Through the above, provide high quality services to the individuals you support.

EXPECTATIONS:

Coaches are expected to demonstrate the following:

- Positive attitude
- Clearly communicate expectations to staff they are coaching
- Questioning to allow for higher order of thinking/problem solving
- Positive working relationship with NS (build trust)
- Direct experience and knowledge of the individuals being supported

Expectations of NS during Coaching sessions:

As a Coach you will be setting a path for the new staff's success. You will help them to make their training experience relevant and meaningful. New staff should:

- Ask questions to clarify
- Produce accurate documentation with respectful language
- Be open to learning new things
- Have a positive attitude
- Be present in each day and learning experience
- Solve problems with a Win-Win perspective
- Own your mistakes
- Show empathy and understanding
- Use Problem solving skills in a daily working environment
- Explain Medication Management for each individual
- Teach back how to document on MAR and the consequences of Medication errors and documentation errors.
- Discern the difference between an Incident Report for Abuse and Neglect versus one for a discovered bruise in a core area.
- Demonstrate knowledge of household emergency procedures and where to locate the fire extinguisher.
- Identify escalating behavior for an individual
- Demonstrate best use of Positive Behavior Support Plan to reduce escalating behavior
- Breakdown program teaching steps
- Show respect for individual by demonstrating communication style for each individual.
- Summarize risk assessment and indicate protective plan to reduce risk and increase safety.
- Support each Individual through an activity of the Individual's choice.
- Compare different outcomes for a problem and determine acceptable solution for a win-win outcome.
- Complete habilitation program with each Individual.
- Demonstrate appropriate prompt level and communication style with each Individual
- Demonstrate use of adaptive equipment (if appropriate for the individual being supported)
- Demonstrate independence with all skills from the Coaching checklist.

OUTCOMES:

- Use quality coaching methods with NS
- Represent the Agency in a professional manner
- Demonstrate proper documentation
- Breakdown teaching into measurable steps
- Assess NS readiness to work alone
- Test skills of NS
- Support NS with building relationships with individuals

Learning Outcomes for the NS using the Checklist: *Each agency may add to these objectives but may not remove any objectives.*

- Demonstrate active listening
- Breakdown focus, action and reflection
- Apply habilitation teaching skills learned in Residential Training
- Show correct documentation in individual's record

- Plan activities for community integration and inclusion specific to an individual

DAY 2

The Peer Coach *must* complete the on the job assignment and review with the facilitator to complete the course and receive a certificate.

Assignment

For the next 1-2 weeks, you will work with an individual(s) you support and staff to:

1. Develop “Risk” Snapshot
2. Develop personalized Checklist
3. Meet with your NS at least 3 times

The classroom training is optional.

Option #1

Facilitator meets 1:1 with Peer Coach to review and discuss assignment, give certificate.

Option #2

Facilitator(s) coordinates scheduling and location for classroom training – length of time to be determined by facilitator. Peer Coaches meet to discuss as a group

- Coaches to bring *completed* assignments
- Be prepared to discuss experience applying Peer Coaching methods in the field

Optional Assignment

Ask participants to step out of their comfort zone and do something between this training and the next that they DO NOT like to do. This could be something they are afraid to do/try, an uncomfortable thing, something new that has not been tried before, or just something they have continuously put off. Does not have to be work related. The idea is to get into the mindset of a NS and develop empathy. Be prepared to share and discuss during next day of training.

*If you give this assignment out, make sure you schedule classroom training.

Materials

The following section contains course materials and templates for use in the classroom training and to provide for On the Job practice.

Note: PowerPoint presentation and Coaching Checklist are separate from this guide.

Block Building Activity Instructions

These instructions are to be viewed ONLY by the designated builder. Follow the guidelines below to build the structure in the photo. You may *not* talk or take pictures.



Build the structure with the same shape and sizes of blocks.

1. Use the same colors (as much as possible as the blocks in your bag may not be the same colors. Shape is most important.)

2. When you are finished, notify the instructor.
3. Instructor will check to see it is completed – blocks are to be disassembled.

Coaching: Listen to Understand NS Scenario Cards

Instructions: Print on colored card stock or paper and laminate for reuse before cutting apart. Use with *Guide to Action* slide.

NS: Read the regular type and wait for the Coach to ask a question. They may ask something that is not indicated here so be prepared to tell a story based on the questions they do ask.

Coach: Ask *questions* where indicated

I was at work today and the strangest thing happened. Mary started to spin in circles and hit her head. (*Then what happened?*) Well she kept pointing to the cupboard where we keep her lunch items. (*Why do you think she did that?*) Well I think she may have done that because lunch wasn't ready. (*What was the real issue?*) We were going out to lunch and her calendar didn't show that we were doing that. (*How could you have handled the situation?*) I should have checked her calendar when I came in this morning to make sure the activity was listed. (*What do you think the consequences were for Mary?*) I think not having the activity on the calendar made her confused and then she got upset. (*What are your next steps?*) I think I'll go and apologize to Mary for not getting the activity on her calendar and then I'll make sure we have that updated every day.

NS: Read the regular type and wait for the Coach to ask a question. They may ask something that is not indicated here so be prepared to tell a story based on the questions they do ask.

Coach: Ask *questions* where indicated

I was at work today and the strangest thing happened. Mary started to spin in circles and hit her head. (*Then what happened?*) Well she kept pointing to the cupboard where we keep her lunch items. (*Why do you think she did that?*) Well I think she may have done that because lunch wasn't ready. (*What was the real issue?*) We were going out to lunch and her calendar didn't show that we were doing that. (*How could you have handled the situation?*) I should have checked her calendar when I came in this morning to make sure the activity was listed. (*What do you think the consequences were for Mary?*) I think not having the activity on the calendar made her confused and then she got upset. (*What are your next steps?*) I think I'll go and apologize to Mary for not getting the activity on her calendar and then I'll make sure we have that updated every day.

Coaching: Listen to Understand Activity cards

Instructions: Copy to colored card stock and laminate before cutting apart. Make enough to give to your new Coaches for their use during Coaching sessions.

<p>Then what happened? Why do you think s/he did that? Tell me more. Was that the real issue? What are some other ways you could have handled that situation? Which approach will work best for you? How did you feel about that? What are your next steps? What kind of help do you need?</p> <p style="text-align: center;"><i>Listen to Understand</i></p>	<p>Then what happened? Why do you think s/he did that? Tell me more. Was that the real issue? What are some other ways you could have handled that situation? Which approach will work best for you? How did you feel about that? What are your next steps? What kind of help do you need?</p> <p style="text-align: center;"><i>Listen to Understand</i></p>
<p>Then what happened? Why do you think s/he did that? Tell me more. Was that the real issue? What are some other ways you could have handled that situation? Which approach will work best for you? How did you feel about that? What are your next steps? What kind of help do you need?</p> <p style="text-align: center;"><i>Listen to Understand</i></p>	<p>Then what happened? Why do you think s/he did that? Tell me more. Was that the real issue? What are some other ways you could have handled that situation? Which approach will work best for you? How did you feel about that? What are your next steps? What kind of help do you need?</p> <p style="text-align: center;"><i>Listen to Understand</i></p>
<p>Then what happened? Why do you think s/he did that? Tell me more. Was that the real issue? What are some other ways you could have handled that situation? Which approach will work best for you? How did you feel about that? What are your next steps? What kind of help do you need?</p> <p style="text-align: center;"><i>Listen to Understand</i></p>	<p>Then what happened? Why do you think s/he did that? Tell me more. Was that the real issue? What are some other ways you could have handled that situation? Which approach will work best for you? How did you feel about that? What are your next steps? What kind of help do you need?</p> <p style="text-align: center;"><i>Listen to Understand</i></p>

Coaching: Feedback Activity Cards

Instructions: Print these cards on two colors of paper. Cut them apart. Give the Coaches one color and the New Staff the other. Ask them to comment on whether the feedback would be helpful to new staff, or how their feedback might differ.

<p>#1 You are NS. Read this scenario to the Coach:</p> <p>I was working with Sean today. He was trying to plant seeds in his garden. He was pushing the seeds in with his finger. When I suggested he try using the stick he got angry and walked away. I tried to get him to come back and finish so I just did it for him.</p>	<p>#1 You are the Coach. Give this feedback:</p> <p>When you interrupted Sean you broke his concentration. His PBSP states that you are not to interrupt this behavior to allow him the opportunity to do things his way. Now, you have taken away something he loves to do. What might your next step be to correct this?</p>
<p>#2 You are NS. Read this scenario to the Coach:</p> <p>Murray was doing his laundry. I gestured for him to put the soap in the dispenser. He placed the tablet in the correct dispenser and I gestured with a thumb's up to show him that he did a good job. He needed help to select the correct setting. I showed him where to push and he pushed the correct button. I watched him while he shut the door and turned the machine on. I asked him what's next and he showed me the dirty dishes in the sink.</p>	<p>#2 You are the Coach. Give this feedback:</p> <p>I like how you followed the teaching program and gave only gestures as cues until he had completed his task. By asking him "What's next?" you gave him the ability to choose the next task he needed to complete. He is in control of his life and you did a good job of supporting him to accomplish what he wanted to do.</p>
<p>#3 You are NS. Read this scenario to the Coach:</p> <p>I told her to sweep the floor, wipe the counters, vacuum the rug and she got mad. She wouldn't do anything I asked her to do!</p>	<p>#3 You are the Coach. Give this feedback:</p> <p>First of all, by giving her three tasks at one time you made it difficult for her to be successful. Remember that her communication style means that she can only handle one task at a time. You gave her three. Secondly, her PBSP states that when it's hot outside she doesn't like to do housework. It was 90 degrees in the shade today. Let's look at her PBSP and see if there are more clues to her behavior in there. What will you do differently next time?</p>
<p>#4 You are NS. Read this scenario to the Coach:</p> <p>He just came at me with his fists flying! I was just trying to tell him to "calm down" so we could go to the movie. He chose the movie and I don't get why he got so upset. I don't think I can work with him anymore.</p>	<p>#4 You are the Coach. Give this feedback:</p> <p>Let's take a look at his PBSP. Look at his communication. "Calm down" is one of the statements that is a trigger or setting event. By using this term you are actually the reason he became upset and tried to hit you. How will you avoid being the trigger in the future?</p>

Snapshot

Coaching

Checklist Objectives

Likes

Person's Name

Dislikes

[Paste Photo here]

Risks

Skills & Abilities

Communication Style

Template objectives: Does your checklist meet the criteria?	Yes	No
Demonstrate active listening		
Apply habilitation teaching skills learned in Residential Training: Full physical assist, physical assist, verbal, gestures, independence		
Show correct documentation in individual's record		
Plan activities for community integration and inclusion specific to an individual		
Use Problem solving skills in a daily working environment		
Explain Medication Management for each individual		
Teach back how to document on MAR and the consequences of Medication errors and documentation errors.		
Discern the difference between an Incident Report for Abuse and Neglect versus one for a discovered bruise in a core area.		
Demonstrate knowledge of household emergency procedures and where to locate the fire extinguisher.		
Identify escalating behavior for an individual		
Demonstrate best use of Positive Behavior Support Plan to reduce escalating behavior		
Breakdown program teaching steps		
Show respect for individual by demonstrating communication style for each individual.		
Summarize risk assessment and indicate protective plan to reduce risk and increase safety.		
Support each Individual through an activity of the Individual's choice.		
Compare different outcomes for a problem and determine acceptable solution for a win-win outcome.		
Complete a habilitation program with each Individual.		
Demonstrate appropriate prompt level and communication style with each Individual		
Demonstrate use of adaptive equipment (if appropriate for the individual being supported)		
Documents effective teaching strategies of modeling by the Coach, guided practice with the staff doing and the coach monitoring/correcting and demonstration of independence by staff doing and coach watching.		
Documents time spent in training		
Documents modeling, guided practice and independence		

Coaching Objectives Checklist

Coaching Agenda

Section 1: To be completed at first meeting with New Staff and Coach

Date:

Staff name:

Coach Name:

Ground Rules:

Meetings will happen: weekly every two weeks monthly

Section 2: To be completed by New Staff (NS)

Review NS goal: (write the staff SMART goal here)

Progress towards the goal: (Complete a *reflection worksheet* prior to the meeting and review with Coach)

Section 3: After discussion, what actions will be taken by the NS and the Coach?

Take Action: What will be done? When will it be done? (Giving an end date allows you to track progress.)

NS:

Coach:

What is NS doing well:

Section 4: New goal for NS. If the first goal is completed, what's the next goal?

Coaching Scenario Cards Instructions: Print out and make a card with one scenario per card (depending on class size, you may need to make multiple of each). These will be handed out during the final classroom activity of Day 1.

COACHING SCENARIO ONE

James: New DSP

Client: Matthew

James is a new DSP who provides support services for Matthew, a 35 year old who has Diabetes. His doctor has asked him to limit his daily calories to 2000 per day and to spend a minimum of 30 minutes per day exercising. Matthew is unable to cook, so James has been preparing his meals and understands well how to put together a daily menu that follows the doctor's orders. Matthew, however, often rejects James' cooking by taking two bites, then leaving the table. Sometimes, he will even throw his food into the garbage (plate and all!). Matthew will then go to the refrigerator and cupboards, take a number of items such as peanut butter, Twinkies, cookies, donuts, and potato chips and make his own "meal." Just this week, Matthew has gone through three jars of peanut butter and two entire boxes of Twinkies. James is having no luck with the exercise routine either. Matthew loves to play video games, as does James, so they will play several hours each day together. But whenever James asks Matthew to go for a walk, Matthew always refuses. This last week, every time Matthew has refused, James would tell him that he didn't want to play the video game anymore and would go into the staff area to catch up on paperwork. Matthew would get upset with James, cursing at him, punching the wall and on occasion, throwing objects at him. Each time, James would eventually reverse his decision and play again, which would make Matthew very happy again.

COACHING SCENARIO TWO

Connie: New DSP

Client: Marge

Connie is an African American new DSP who is 25 years old. She provides support services for Marge, who is 52 years old and is able to do many living skills herself. From all of your observations, Connie and Marge get along quite well. Connie has been especially attentive to Marge, which Marge seems to enjoy a great deal. Marge loves to play Monopoly, and Connie happily participates. After two weeks of working at Marge's home by herself, Connie lets you know that the relationship has deteriorated drastically. She tells you that Marge orders her around and treats her like a servant. She has been making her do her laundry and cook her meals. She has been yelling at her, and has made several racist comments towards her. Even their Monopoly playing has stopped - especially because Connie is too busy taking care of Marge's needs.

COACHING SCENARIO THREE

Marshall: New DSP **Clients: Allen and Gordon**

Marshall is a new DSP who provides support services on various shifts, for two roommates, Allen and Gordon. Allen is fairly independent and has a job that he goes to every day between 10:00 and 3:00. Gordon doesn't work, but he prefers a rigid routine, that seems to revolve around Allen's day. Both get up at 8:00 in the morning, have breakfast and then get dressed. At 9:15 when Allen leaves for work, Gordon goes into his bedroom and shuts the door. He comes out at 12:00, makes a sandwich, then goes back into his room to eat. When Allen returns at 3:45, Gordon comes out of his room and he and Allen play video games until 5:30, when Marshall or Allen provide dinner. After dinner, Allen goes next door to visit his girlfriend, while Gordon goes to his room and shuts the door. When he hears the front door open from Allen returning, he goes into the bathroom to brush his teeth, then goes straight to bed. During your coaching session, Marshall shares his concern that Gordon doesn't like him, and they seem to have nothing in common. He tells you that another DSP, Ben, has shared with him that Gordon will play video games with him rather than go to his room and even goes to the park on Thursday afternoons. He is confused by Gordon's willingness to change his routine, because he was told by you and others how important "routine" was for Gordon's quality of life. Whenever Marshall has asked if Gordon would like to do anything, Gordon usually shrugs his shoulders, mumbles something and shuts the door to his room. A couple of times, he has knocked on Gordon's bedroom door with an idea for something fun to do, but Gordon doesn't respond and instead, turns his music up louder to drown Marshall's voice out.

COACHING SCENARIO FOUR

Janice: New DSP **Client: Carolyn**

Janice is a new DSP who works with Carolyn. Carolyn loves to go to the mall, walk into every store (except one), and say "hello" to the people that work there. Many people know her by first name and enjoy their conversations a great deal. She does this 2-3 times per week. Last year, she was asked to not come back to a store because on two separate occasions, she intentionally knocked over and broke a very expensive crystal item. Janice comes to you because she is concerned that Carolyn may be banned from another store. One of the stores she visits has large, clear plastic cylindrical containers of candy that are designed to fill a bag by pulling a plastic knob to let the candy flow. Twice last week when Carolyn went into the store, instead of talking to the store clerks like she usually does, she went to multiple containers and pulled on the knobs, sending Candy pouring out all over the floor. She apologized and promised she would never do it again, but immediately did it again the next day. The second time, the owner came out from the back, obviously upset, and told Janice that she needed to do a better job of "controlling" Carolyn. Janice told you she "was never so embarrassed in my whole life" but that her larger concern was that Janice would be very upset if she were banned from what was undoubtedly, one of her favorite stores in the mall.

COACHING SCENARIO FIVE

Conner: New DSP

Client: Daniel

Conner is a new DSP who provides support services for Daniel. Conner has been very respectful of Daniel by not dictating to Daniel what to do, and by allowing Daniel to make decisions and offer choices. Connor comes to you for advice because he has been having hygiene issues with Daniel. Daniel wears briefs and does not like to have assistance when he needs to change them. Unfortunately, he doesn't change them nearly as often as they need to be. There are days when he sits in feces and urine for most of the day. The briefs will sometimes leak onto the furniture, causing the room to smell and making his roommates angry. It seems that the problem has been getting worse. The more often Conner suggests that he change his briefs, the longer Daniel stays in them.

COACHING SCENARIO SIX

Andie: New DSP

Client: Lori

Andie is a new DSP who provides support services to Lori. Lori is on a tight budget and Andie has been great at helping show her how to best stick to her budget when they go shopping and when planning for activities. Andie comes to you for advice, because there is one area that has been eroding into her budget and causing difficulty. In her budget, Lori can have 5 cigarettes a day. Unfortunately, she would prefer to smoke more. Lori gets very upset when she is reminded about her limited cigarette budget. She will yell at Andie, and call her a "Nazi Prison Guard." Many times, she will simply take a cigarette and go in the bathroom, lock the door and smoke it. All of the roommates, including Lori, made a 'no smoking in the house' rule, so the situation is causing problems between them, with several shouting matches just in the last week.

Reflection Activity Sheet

Purpose: provide a way for staff to think through different events throughout the day, review during coaching sessions for discussion and feedback. Staff may complete this as soon after the event as possible without interfering with their work or the safety of the person they are supporting. Staff may keep these completed forms for their own personal growth.

1. What happened? Describe the event that took place. State facts not opinions.

2. What were the consequences?

A. For you?

B. For the Client?

C. For the Agency?

3. How would you handle a similar situation in the future?

4. Who can you talk to for additional support, perspective, and guidance?

5. What can you do in the next 48 hours to practice what you learned? This may include study of individual's documents.

Coach name:

6. Shared with Coach: date: _____

Coach initials:

Action Plan

Instructions

You are tasked with returning to the home where someone you support lives and receives services. You are to work with this individual to review the *Snapshot* to ensure the information meets the expectations of this individual. The information needs to be approved by the person it is about (“Nothing about me without me”). *If your agency has chosen not to use this form, please skip to the next step.*

Repeat the steps with the *Coaching Checklist*. The only items you may remove from the checklist are those that do not apply to this individual. You may add anything that is missing. The order these items appear on the list should be prioritized by the individual and updated by you. It may be best to prioritize by section to keep topics together and simplify the process for the individual with whom you are working. Explain to the individual that your agency also has some priorities and requirements. *Even if the individual does not see the importance of these items you may not remove them from the checklist.*

1. Make an appointment with the person to review, add to their calendar.
2. Determine what you need to consider for the meeting (i.e. specific communication, how you will approach the topic and explain it, who else should be there, etc.)
3. Identify the priorities for training new staff about the individual. These will be first on the **Coaching checklist**.
4. **Identify Priorities** from the Agency’s perspective. These will follow the priorities of the individual in an order that makes sense. Not prioritizing risks related to falls, choking, abuse, neglect etc. would be placing the agency and the individual at risk of harm.
5. Update the form and share it with the individual. Make any changes necessary.
6. Use the form for training new staff along with the Coaching checklist.

Peer Coaching Guide

Instructions: Use this guide to assist you as you begin to coach. You may want to take notes.

What should I do first when I start to Coach a NS?

1. **Complete Section 1 of the Coaching Agenda:**

2. **Write a SMART goal with your new staff participant:**
 - S – Specific
 - M – Measurable
 - A – Actionable
 - R – Relevant
 - T – Time Bound

3. **Listen to Understand:**
 - Observe:

4. **Give Specific Feedback:**
 - Constructive

5. **Support Remaining focus by working on a single skill and talking to your coach frequently:**

6. **Guide to take action:**

7. **Encourage:**

8. **Learn from experience:**

Evaluation

Agency Name:
Name of course:
Date:

Instructor Name:
CE code:

	Disagree				Agree
Evaluation – circle the appropriate one	lowest				highest
This training met my expectations	1	2	3	4	5
Trainer was easy to understand	1	2	3	4	5
Content was easy to understand	1	2	3	4	5
Activities were fun and easy to follow	1	2	3	4	5
Materials / handouts are useful	1	2	3	4	5

What aspect of this training is going to help me most in training the new staff at my agency?

What aspect of this training is going to be the most challenging in training the new staff in my agency?

What aspect of the curriculum is going to be the most useful to me as a Coach?

What aspect if the curriculum is going to be the most challenging for me as a Coach?

Best thing about the training?

Please hand this to the trainer and you will receive your certificate. Thank you for attending!

