

# PERFECT 50+

## The Coach Handbook

The project PERFECT 50+ is financially supported by the European Union in the frame of the Program Lifelong Learning





## Table of Contents

The Coach Handbook.....	4
The Task of the VET-Coach.....	4
Glossary.....	5
1 An Overview.....	6
2 Detailed Description of the Coaching.....	8
2.1 Task Assignment.....	8
2.2 Checking the Task.....	10
2.3 Development Plan and Activity Plan.....	12
2.4 Select a Training.....	14
2.5 Coaching During and After the Training.....	16
2.6 Completing the Coaching Process.....	18
Annex: Tools.....	21
Tool 1: Assignment.....	24
Tool 2: Memo.....	25
Tool 3: Checklists for the Coach.....	26
Tool 4: Personal Development Plan.....	30
Tool 5: Personal Activity Plan.....	32
Tool 6: Comparison of Training Bids.....	33
Tool 7: Management Decision.....	35
Tool 8: Feedback on Training Course.....	36

## The Coach Handbook

This handbook was written to support a VET-Coach. It shows the activities that are part of the VET-Coaching process in detailed steps. Therefore, this manual can be used as a reference book for specific topics or tasks and, also, as a guideline that allows to retrace the steps of the VET-Coach's tasks in detail. Each step is explained and examples were added where they were helpful to clearly understand the process of VET-Coaching. Forms and other helpful tools are provided and explained, too.

The handbook comes in two parts. The first part begins with a glossary, which is provided to clarify some terms to avoid misunderstandings of vital terms and concepts that are used in this manual. Afterwards, the job of the VET-Coach is described and explained. To further a better orientation, a flowchart is provided on each left page, whereas the right page contains the corresponding explanations.

The second part of the handbook contains some forms, that were created to facilitate the daily work of the VET-Coach. A Microsoft-Word version of the forms is provided along with this manual, but the forms could also be used as master for photocopied sheets that can be filled out manually.

## The Task of the VET-Coach

It is the task of the VET-Coach to support 50+ employees in companies in matters of vocational education and training. Maintaining the competitiveness of an enterprise demands qualified and competent staff. Thus the VET-Coach shall contribute to the development of the employees' competences to help to preserve the enterprise's future productivity.

## Glossary

### Coach

means not any coach in general but the VET-Coach.

### Coaching

is a method of directing, instructing and training a person with the aim to achieve some goal or develop specific skills. There are many types of coaching. In the context of this paper coaching means to direct, instruct and train a person with the aim to preserve and/or enhance his or her professional competences.

### Coachee

is the person directed by the coach.

### VET-Coach

supports 50+ employees in a way described under „Coaching“ above.

### Further Vocational Training

is meant in the broadest sense, which also comprises the change of assigned work tasks or the work place accompanied by an “on-the-job” training. It does, however, not include initial vocational training of young people after the left school.

## I An Overview

Figure I shows an overview of the VET-Coach's tasks.

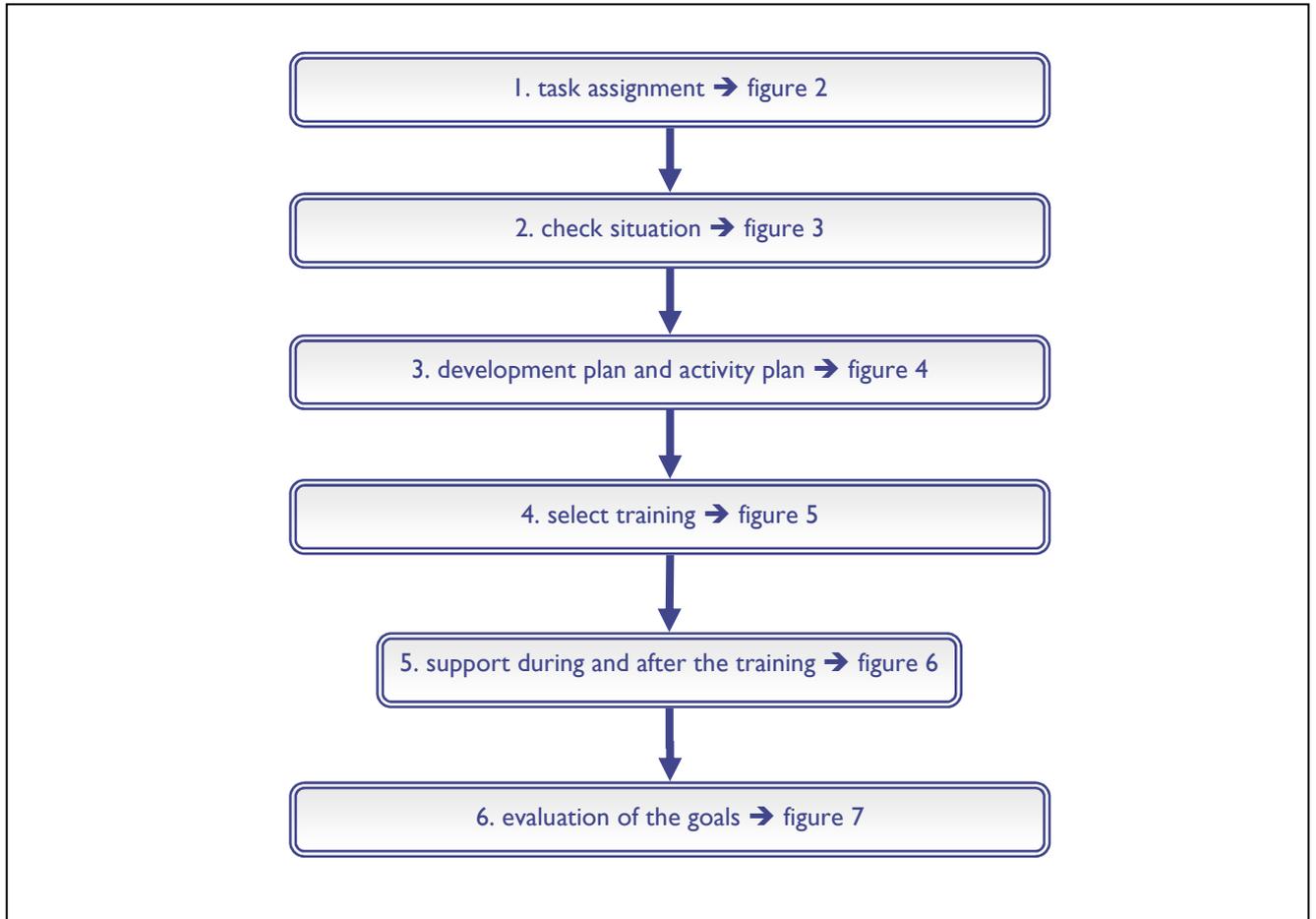


Fig. I: Flowchart: VET-Coach activities - overview

1. The VET-Coach's work starts with the assignment of a task by the entrepreneur or company management.
2. The first activity should always be a dialogue between the coach and the coachee (employee that should benefit from a further vocational training). The aim of the interview is to check and analyse the coachee's work situation to get a clear picture of the task itself.
3. In this step, coach and coachee together work on the coachee's personal development plan, that explains the current situation as well as the personal development that the coachee seeks. Then a personal activity plan is created, that describes the concrete steps that the coachee will take to reach the personal development plan's aims. The coach's task is to adjust and balance the coachee's aims in view of the entrepreneur's or company management's aims.
4. If the personal activity plan lists a measure of further vocational training and this measure is consented by the entrepreneur/management, the next task of the coach is to search for offers of training providers that could meet the demands of the personal activity plan and to make a proposal to the entrepreneur/management.
5. If the training measure is consented by the entrepreneur/management, the coach supports the coachee. If the training is not a short one, the support accompanies the training period. This would be the case for trainings that take place on several weekends or after work over a longer time. In shorter trainings the coaching begins with the end of the training.  
The goal of a training measure is, that the coachee should acquire or develop specific competences for their work. To secure the transfer of the newly acquired knowledge and/or capabilities into the daily work practice, the coaching does not end with the training measure itself, but goes on for an agreed period of time afterwards.  
This is done, because
  - a. this allows a continuous and conscious implementation of the new capabilities. Especially in the case of soft skills as dealing with customers or coping with stress, the acquired strategies tend to be forgotten as soon as the work process begins. This clearly diminishes the effect of the training.
  - b. to really assess the success of a training, the changes in the daily work and/or behaviour of the coachee are the real targets that should be evaluated.
6. At the end of the coaching, an evaluation is done, in how far the targets of the personal development plan (and, of course, those of the company) were achieved. The result of the evaluation is shared with the entrepreneur/management and also forms the basis of the growing experience of the coach himself, so that he becomes a kind of internal expert for vocational training inside the company.

Following this overview, the coaching process is now described in detail. The use of the tools that are provided in the annex is also included in the description.

## 2 Detailed Description of the Coaching

### 2.1 Task Assignment

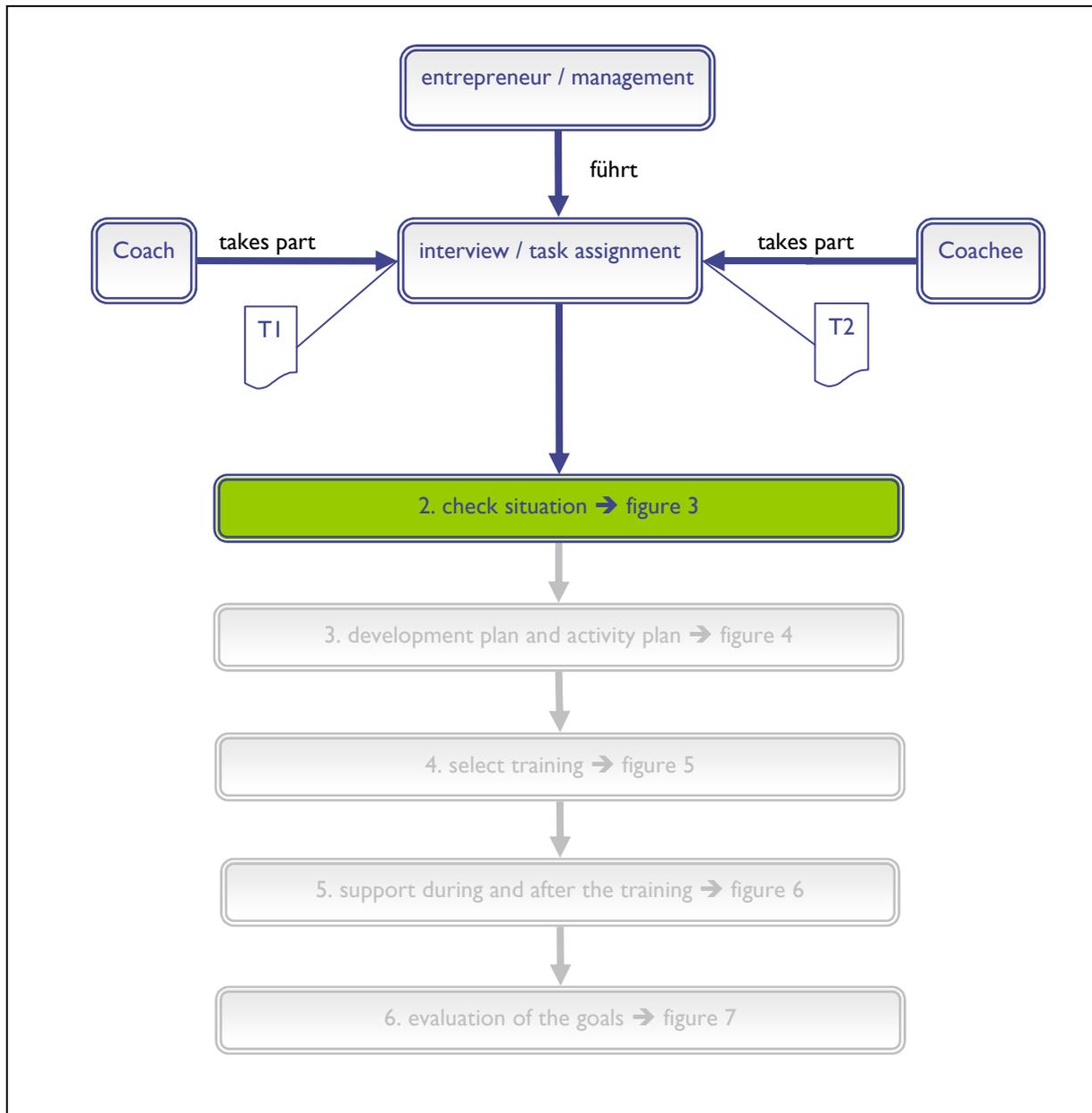


Fig. 2: Task assignment

As shown in figure 2, the process starts with the assignment of a task by the entrepreneur/management. This task will sometimes be very concrete and specific, e.g. Mr. Jones needs to learn French to be able to answer phone-calls from French customers. However, it is also possible that the task is very unspecific, e.g. Mrs Doe has been less productive in the last weeks, please check why.

It would be helpful, if the employee that is concerned is also informed by the entrepreneur/management, and not by the coach. This could be done in a joint interview with all three parties concerned.

Tool 1 can be used to record the information about the task as given by the entrepreneur/management. If the company's internal organisation demands a signed document, tool 1 could be used for that purpose, too. If you want to take notes during the interview with the management, tool 2 could be used.

## 2.2 Checking the Task

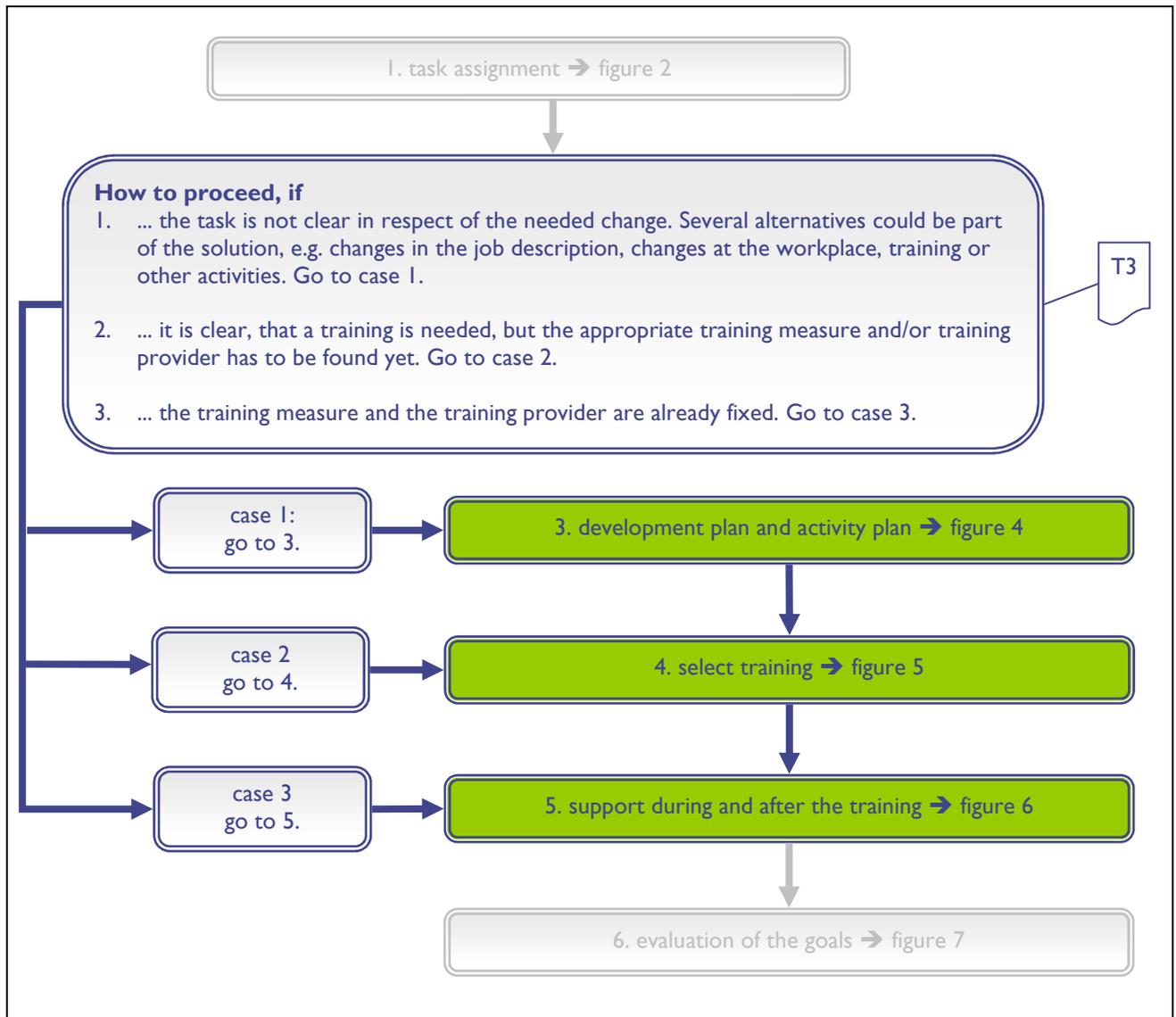


Abb. 3: Flowchart check situation

As described above, the task assignment could be very different, according to the situation. Therefore, the three statements in figure 3 help to determine the starting point of the coaching process. The following examples are provided to give an idea what kind of tasks could demand what kind of activities.

1. *A new machine is/was bought by the company*

A company buys a new machine. The only provider of trainings on how to use the machine is the manufacturer. In this case, statement 3 applies: the training need as well as the training provider are given. The coaching starts with step 5 because steps 3 and 4 are irrelevant in this case.

2. *An employee needs to learn a foreign language*

An employee increasingly gets phone calls from French customers. Up to now, she has forwarded those to another employee. The entrepreneur now feels that this would be no longer a feasible option and decides that she should take a course in French. In this situation statement 2 applies. It is known, what kind of training is needed, but the exact measure and the training provider has still to be selected. The process starts with step 4. Step 3 is skipped because it is not needed to solve the problem.

3. *An employee needs a training in communication*

An employee who frequently has to deal with customers feels very unsecure if he comes in contact with difficult people. The entrepreneur suggests that he takes a course in communication. Here, again, statement 2 is the adequate description, so that the coaching begins with step 4 and step 3 is skipped.

4. *An example of an unspecific / unclear situation*

A worker recently produced more deficient products than usual. The entrepreneur asks the coach to support the worker in clarifying the reasons and finding an appropriate and workable solution. In this case it is totally open, what the outcome will be. This situation might or might not lead to a training. So here statement 1 is adequate, so that the coaching starts with step 3.

5. *A new workplace*

An employee gets a new workplace with new tasks. The coach is given the task to support the employee in finding out if any training measures are needed for the new job. Here, too, step 3 should be the first because the match of job requirements and employee's capabilities has not been sufficiently made. The coaching again starts with step 3.

A tool to structure the situation check is tool 3. Especially the checklist for checking the task supports the identification of the necessary next steps.

### 2.3 Development Plan and Activity Plan

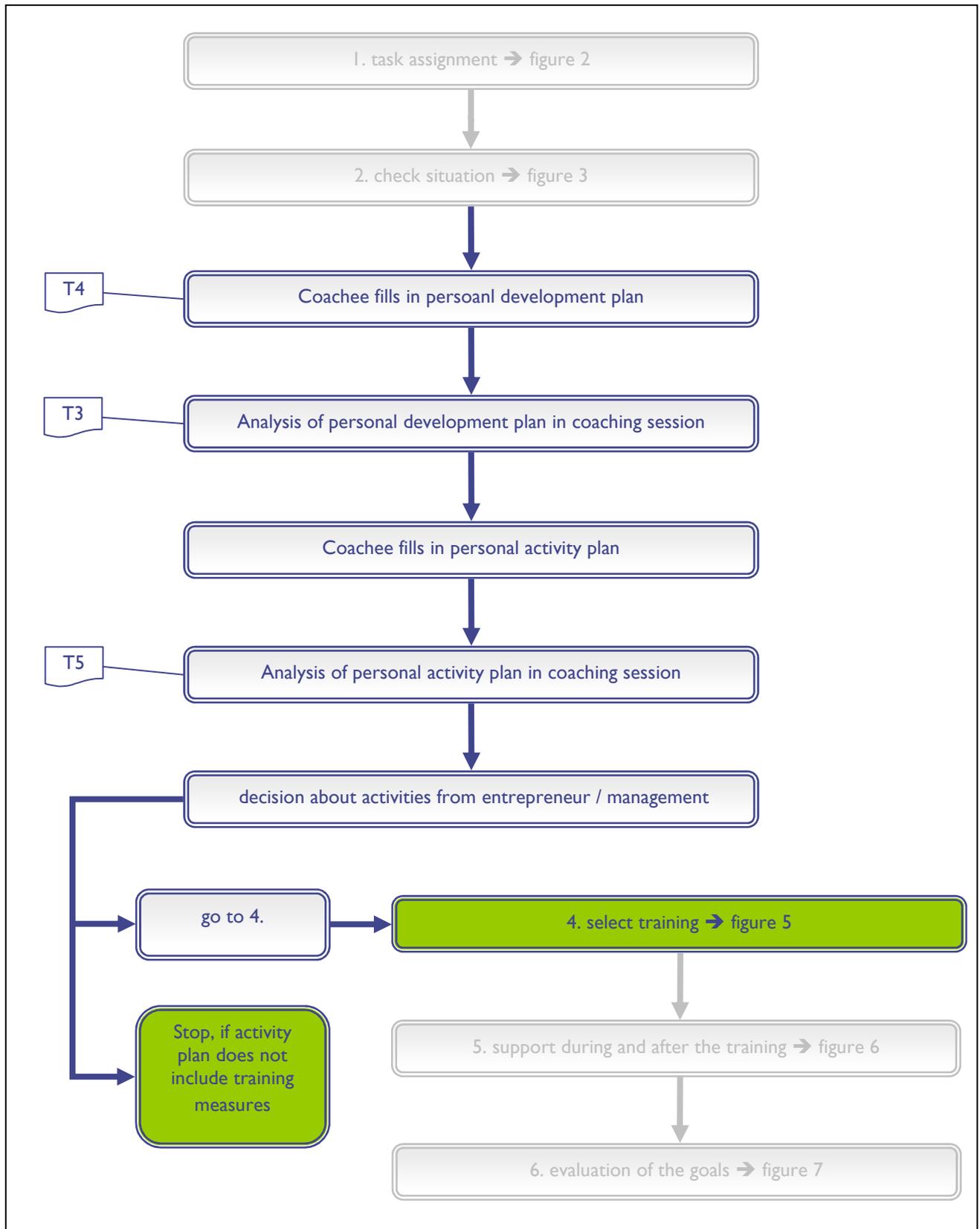


Abb. 4: compile development and activity plan

The development- and activity plan is compiled by the coachee to enable him to clearly define his personal goals and wishes before talking about them. After he compiled the two documents these are reviewed with the coach during a coaching session. The coach supports the coachee in formulating and completing both plans. Depending on the needs of the coachee, both documents could be created in one step or the development plan could be completed before the work on the activity plan begins.

If all details are fixed, the activity plan will then be coordinated with the entrepreneur in regard of the final decision.

Tools 4 and 5 can be used to create the personal development plan and the personal activity plan. Tool 3 shall support the coach in analysing the causes for the coachee's situation.

## 2.4 Select a Training<sup>1</sup>

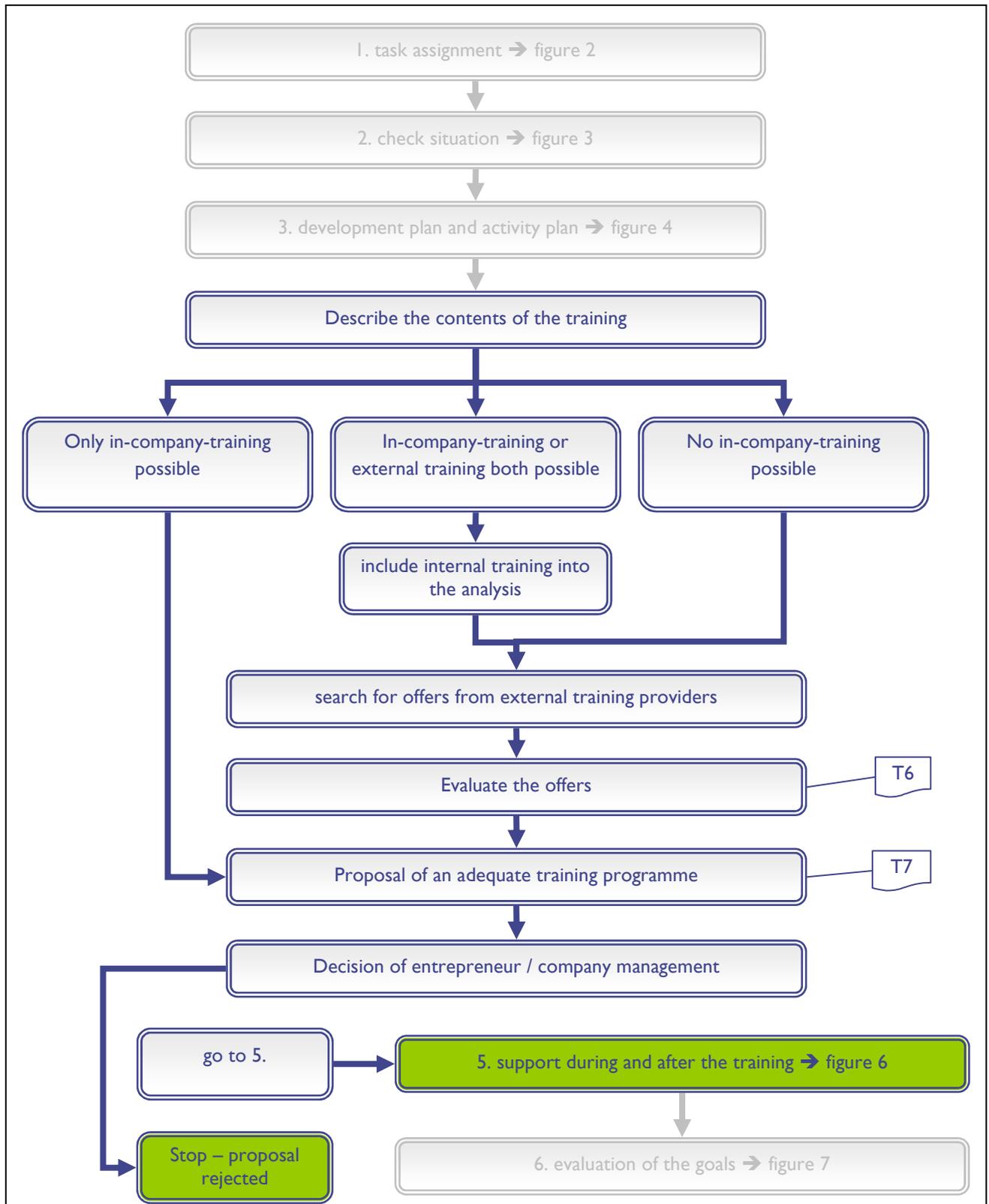


Abb. 5: Select a training measure

<sup>1</sup> The term „in-company-training“ in the diagram means a program completely implemented with resources from inside the company, not a training measure where an external trainer just uses the company’s rooms.

At this point a training measure should be selected. The first question is, if it is possible to make an in-company-training<sup>2</sup> or if it is necessary to buy an external training.

Some workplaces will exist in most companies, where the processes are so specific, that no external provider can give in-depth trainings. In these cases, most aspects of this sub-step can be skipped, because there is no comparison between options and the only task will be to make a proposal about an in-company-training.

The exact opposite of the case just described is a training, that cannot be implemented as in-company-training. A typical example is a language-course. In this case, external offers need to be researched. Please note, that a training with an external trainer that uses resources of the company (rooms, machines etc.) is nonetheless counted as external in this context, because the coach still has to research for offers, compare them and provide a proposal for the entrepreneur to decide on.

Finally, there may be mixed cases, where both, an in-company-training and an external training might be an option. For example, in working with a software product where the company already has employees that work with it, the training might be given by an employee or by an external trainer. In this case, obviously, both options should be taken into account and compared.

The comparison of training offers is not as simple as it first seems, for there are some factors that are easy to calculate (price of training, travel costs etc), but also others that are qualitative in nature (acceptance of the certificate, quality of the training provider, does the curriculum fill all needs of the company etc). To make those factors comparable, a benefit-analysis is proposed in the context of this concept. The effort that this method causes is justified by the normally high costs of high-quality and specialised training measures.

Tool 6 could be used for the evaluation of training offers. Tool 7 provides a form where all relevant facts could be collected for easy reference and basis for decision from the entrepreneur.

---

<sup>2</sup> The term „in-company-training“ in the diagram means a program completely implemented with resources from inside the company, not a training measure where an external trainer just uses the company's rooms or other resources.

## 2.5 Coaching During and After the Training

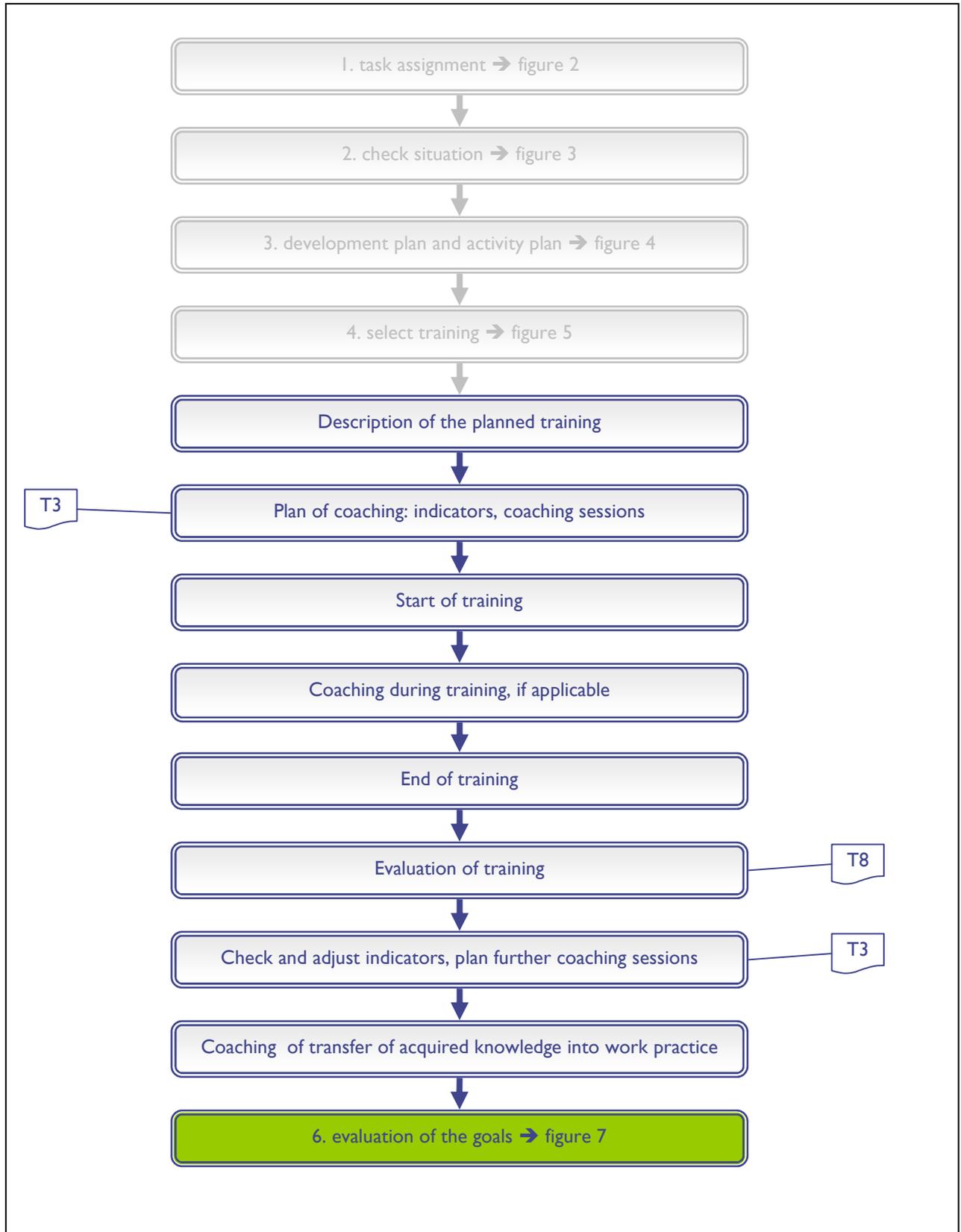


Fig. 6: Coaching during and after the training

This step integrates two functions of the coach: to support the coachee during and after the training and to help him/her to reflect on the learning process as well as on the transfer of the acquired competences into the daily work practice.

In addition to planning and implementing the coaching itself, the coach also works with the coachee on defining target indicators to evaluate the success of the training measure. Based on this evaluation, the transfer of the acquired competences into the daily work practice of the coachee is systematically supported by the coach.

Tool 3 could be used to check and adapt the target indicators. Tool 8 was designed to evaluate the training measure.

## 2.6 Completing the Coaching Process

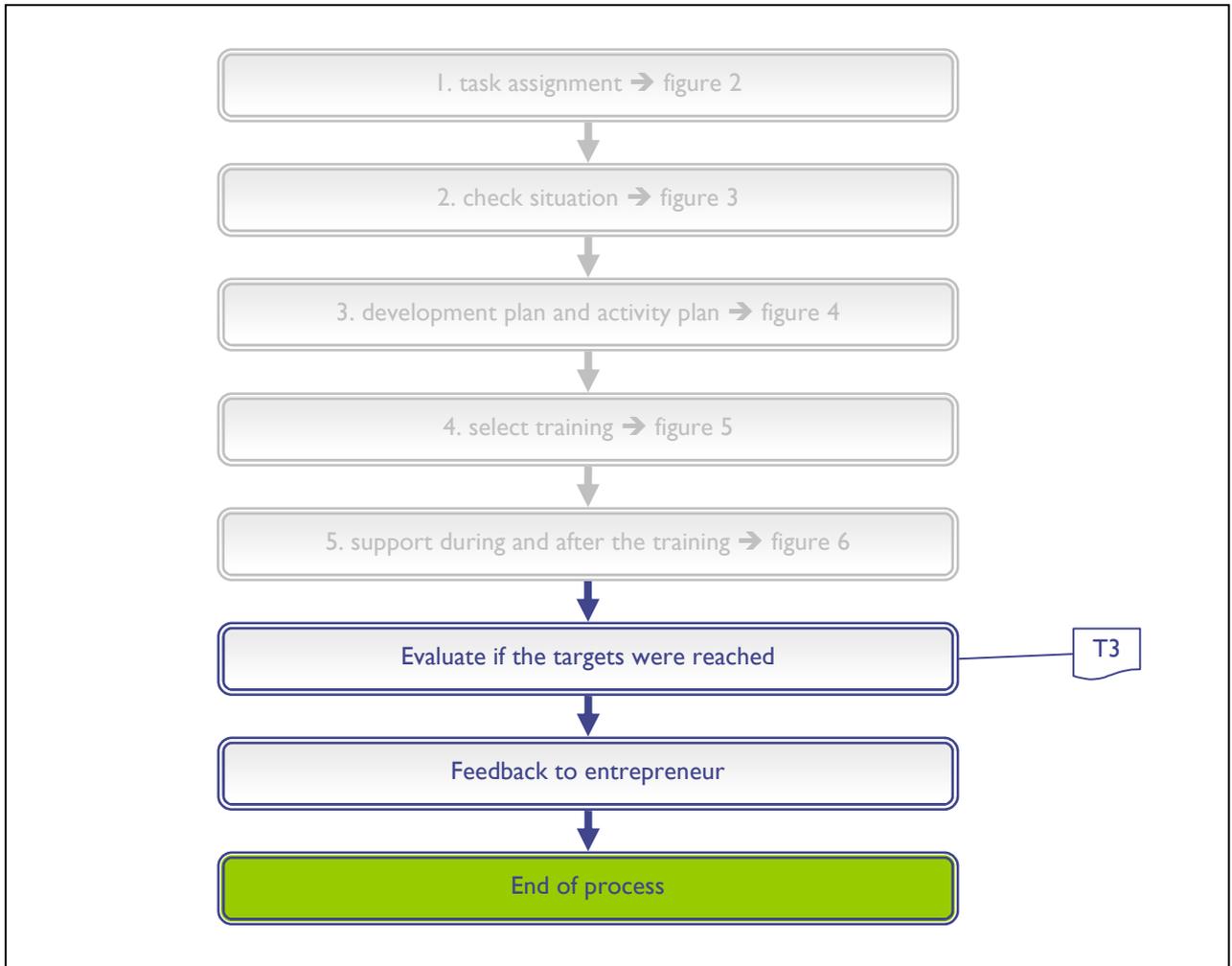


Abb. 7: Assessment and conclusion of the coaching process

Finally, the goals set at the beginning of the coaching process are compared with the results. A summary is given to the entrepreneur as feedback.

Tool 3 will be useful to evaluate, if the targets were reached.



## **Annex: Tools**



---

Tool 1	Assignment
Tool 2	Memo
Tool 3	Checklists for the Coach Checklist Assignment Checklist PEP / PAP Checklist Coaching Process
Tool 4	Personal Development Plan (PEP)
Tool 5	Personal Activity Plan (PAP)
Tool 6	Comparison of Training Bids
Tool 7	Management Decision
Tool 8	Feedback on Training Course

## Tool I: Coaching Assignment

<b>Coaching-process-identifier</b>	
<b>Coach</b>	
<b>Employee</b>	
<b>Initial Situation</b>	
<b>Goals of Coaching Process (entrepreneur/management)</b>	
<b>Training needs (if already known)</b>	
<b>Training Provider (if already known)</b>	
<b>Kind of Training (if already known)</b>	
<b>Timeframe (if already known)</b>	
<b>Budget Limit</b>	

\_\_\_\_\_  
(Date, Signature Company)

\_\_\_\_\_  
(Date, Signature Coach)

## Tool 2: Memo

<b>Date:</b>	_____
<b>Persons involved:</b>	_____
<b>Notes made by:</b>	_____
<b>Topic of the interview:</b>	_____
	_____
	_____

### Memo

### Tool 3: Checklists for the Coach

Checklist Assignment  
 Checklist PEP / PAP  
 Checklist Coaching Process

#### Checkliste Assignment

<b>Coaching-Process-Identifier</b>		
<b>Coach</b>		
<b>Employee</b>		
<b>Are the company's goals described?</b>	<input type="checkbox"/> yes <input type="checkbox"/> no	
	If yes, in which document	
<b>Are the employee's goals described?</b>	<input type="checkbox"/> yes <input type="checkbox"/> no	
	If yes, in which document	
<b>Are the employee's training needs described?</b>	<input type="checkbox"/> yes <input type="checkbox"/> no	
	If yes, in which document	
<b>Which training provider should implement the training?</b>		
<b>Name and kind of training measure</b>		
<b>Price of training measure</b>		
<b>Begin – End of training measure</b>	Begin:  End:	
<b>Proposed training measure approved by entrepreneur/ company management?</b>		
<b>Employee already registered for training measure.</b>		

### Checklist Personal Development Plan / Personal Activity Plan

The description of the employee's initial situation and the underlying causes should take into account the following aspects:

	Done?	Remark
⇒ formal/organisational obstacles	<input type="checkbox"/> yes	_____
⇒ Professional competence of employee	<input type="checkbox"/> yes	_____
⇒ Soft skills of employee	<input type="checkbox"/> yes	_____
⇒ Health of employee	<input type="checkbox"/> yes	_____
⇒ Personal interests of employee	<input type="checkbox"/> yes	_____
⇒ Work situation (Team, Workload etc.)	<input type="checkbox"/> yes	_____
⇒ Personal life situation of employee (burdens, Crises etc.)	<input type="checkbox"/> yes	_____
⇒ Complete overview of competences, conditions and requirements	<input type="checkbox"/> yes	_____

### Checklist Coaching Process

<b>Coaching-Process-Identifier</b>	
<b>Coach</b>	
<b>Employee</b>	

#### *Coaching before and during the training*

<b>What are the goals that the employee want to attain with the training?</b>	
---	--

<b>What conditions tell us that the goals are reached (indicators)?</b>	
---	--

<b>Coaching sessions during the training period.</b>		Date	Time		Date	Time	

#### *Coaching after the training but before transfer into work practice*

<b>Are the employee's goals described?</b>	<input type="checkbox"/> yes <input type="checkbox"/> no
	If yes, how?
	Which new indicators are agreed on?

<b>Coaching sessions during the transfer phase</b>		Date	Time		Date	Time	

*Coaching after the transfer into work practice*

<b>Which goals did the employee attain?</b>	
<b>Which indicators show that the goals have been attained?</b>	
<b>Postprocessing of the coaching process: Please evaluate the points on the left!</b>	Planning phase before training
	Execution of the training
	Coaching
	Transfer into daily work practice

## Tool 4: Personal Development Plan

### Present Situation

The coaching is done to bring about changes to improve my work situation. Here I describe my current work situation.	
What are the causes, that led to this situation?	

### Goal

Which goal(s) do I want to achieve in view of my current situation at work.	
---	--

### Effect on Personal Situation

What are the positive effects on my situation, if I reached my goal(s)?	
What are the negative effects on my situation, if I reached my goal(s)?	
What will happen to my situation, if the current situation remains unchanged?	

### Effects on Other People

What are the positive effects on other people that are important to me, if my goal(s) is reached?	
What are the negative effects on other people that are important to me, if my goal(s) is reached?	
If my current situation remains unchanged, what effects will that have on other people important to me?	

**Effects on Work Tasks**

What will be the positive effects for my work tasks, if the goal(s) is reached?	
What will be the negative effects for my work tasks, if the goal(s) is reached?	
If the situation remains unchanged, what consequences will that have for my work tasks?	

**Obstacles**

Obstacles that originate in my personality (thoughts, attitudes, beliefs etc.)	
Obstacles that originate in other persons (expectations, obligations, responsibilities etc.)	
Obstacles that originate in organisational conditions (time, duties, roles etc.)	

**Activities towards achieving the goal**

What did I do up to now to achieve my goal(s)? What were the results?	
--	--

**Timeframe**

Is there a deadline, after which the reaching of my goal(s) will become useless?	
--	--

## Tool 5: Personal Activity Plan

<p><b>What to do</b></p> <p>What will I do to reach my goal?</p>	
<p><b>What to avoid</b></p> <p>What will I avoid to do to reach my goal?</p>	
<p><b>Timeframe</b></p> <p>When and how often will I carry out the activities listed above?</p>	

\_\_\_\_\_  
(Date, Signature Employee)

\_\_\_\_\_  
(Date, Signature Coach)

### Tool 6: Comparison of Training Bids

Criterion	Weight (Points)	Bid 1:		Bid 2:		Bid 3:	
		Value	Value Criterion	Value	Value Criterion	Value	Value Criterion
		<b>Result 1:</b>		<b>Result 2:</b>		<b>Result 3:</b>	

### Documenting the evaluation of a single criterion

Name of criterion: \_\_\_\_\_

Points	Description
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

## Tool 7: Management Decision

<b>Coaching-process-Identifizier</b>	
<b>Coach</b>	
<b>Employee</b>	
<b>Training needs</b>	
<b>Proposed training measure</b>	
<b>Costs of the training measure</b>	
<b>Additional costs (travel costs, accomodation etc.)</b>	
<b>Alternative bids (incl. information about total costs)</b>	
<b>Explanatory statement for the proposal</b>	
<b>Proposal presented (date)</b>	
<b>Decision</b>	

\_\_\_\_\_  
(Date, Signature Entrepreneur)

## Tool 8: Feedback on Training Course

### Frame of the training

	++	+	-	--
Reception and welcoming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support by trainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of participants adequate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organisation (breaks etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timeframe kept?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Course

	++	+	-	--
Structure of training / topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comprehensibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Practical relevance (Are the newly acquired skills relevant for the participant's work?)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Methodology (How was the content taught?)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents for participants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Presentation of content by trainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competence/Knowledge of the trainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Were company-specific aspects taken into account by trainer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exercises, case studies, real-life examples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did the trainer attend to the needs of the participants?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Conclusion

<b>Usefulness for the work of the employee: did the training support the employee to fulfil his work tasks better or more easily?</b>				
<input type="checkbox"/> very good	<input type="checkbox"/> much	<input type="checkbox"/> more or less	<input type="checkbox"/> sparesly	<input type="checkbox"/> not at all
<b>Were your expectations fulfilled?</b>				
<input type="checkbox"/> very good	<input type="checkbox"/> much	<input type="checkbox"/> more or less	<input type="checkbox"/> sparesly	<input type="checkbox"/> not at all
<b>Duration of the course</b>				
<input type="checkbox"/> too long	<input type="checkbox"/> just right	<input type="checkbox"/> too short		
<b>The topics were...</b>				
<input type="checkbox"/> too demanding	<input type="checkbox"/> just right	<input type="checkbox"/> too simple		

<b>What did you like best?</b>		
<b>What could be done better (your opinion)?</b>		
<b>What part of the training should be covered in more depth?</b>		
<b>What part of the training could be shortened?</b>		
<b>Are you interested in advanced seminars on the</b>	<input type="checkbox"/> yes	<input type="checkbox"/> no
<b>If yes, what other topics should be taken into account?</b>		
<b>Other Remarks</b>		