

# ACTO Coach Trainer Competency Task Force

April 19, 2017

## INTRODUCTION

This document was created by a task force of Association of Coach Training Organizations (ACTO) members who own or are senior faculty of training programs accredited by the International Coach Federation (ICF). The intention is to define the competencies a coach trainer and educator should be able to demonstrate. The document will be provided to coach training organizations and schools as a resource to use for hiring, evaluating, and developing faculty.

Part I includes a compilation of competencies identified by expert sources (list of sources on page 5). These competencies have been validated so there is no need to re-create the work. The list serves as a foundation of fundamental skills for trainers. The list is not absolute, but the team felt it was comprehensive after reviewing multiple lists available by the expert sources.

Part II builds on the previous list identifying additional competencies specific to coach trainers in conjunction with current professional standards. The domains include Personal and Interpersonal Competencies, Facilitation Skills, Knowledge of Group Dynamics, and Learning and Instructional Competencies specific to coach training. The lists were researched and created by different subgroups of the task force so there is some overlap. The Task Force feels it is a good starting point for defining competencies coach training schools can use for hiring and developing their trainer teams.

Part I Compilation of Trainer Competencies from Expert Source .....	page 2
Part II Competencies Specific to Coach Trainers .....	page 6

**NOTE:** The term Coach Trainer in this document includes the activities of those who define themselves as Coach Educators. The focus of this document is to define the competencies and behaviors expected by the person delivering both training and education to students seeking to become competent in the use of coaching skills however they choose to use the skills outside of the coach training school, in-house coach training program, or academic institution.

### Task Force Members:

#### Task Force Chair

Marcia Reynolds, PsyD, MCC  
Healthcare Coaching Institute,  
Director, 2017 ICF Global Board

Dave Buck, MCC, CoachVille Coach Training  
Mohamed Bahgat, SeGa Group  
Marion Franklin, MCC, Life Coaching Group  
Cathy Liska, ACC, Center for Coaching Certification  
Lynn Meinke, PCC, Institute for Life Coach Training  
Linda Page, PhD, Adler Graduate School  
Peter J Reding, MBA, MCC, Coach For Life  
Juliann Spoth, MCC, Gestalt Institute of Cleveland

## **Part I**

### **Compilation of Expert-defined Trainer Competencies**

This segment is a compilation of trainer competencies from various expert sources and serves as a foundation for coach trainer competencies.

#### **A. Plan and Prepare**

1. Identifies and explains the connection between the needs assessment and/or specific behavioral objectives to the training strategies.
2. Reviews the learning objectives that define the specific knowledge, skills, attitudes, or values to be demonstrated upon completion with participants.
  - a. Analyzes curriculum and contrasts with participants' current specific knowledge and skills.
3. Plans content delivery within the time allotted.
  - a. Reviews options for technological support.
  - b. Times exercise activities and debrief sessions to fit or adapt training design.
4. Organizes instructional activities, materials, and resources for content and delivery that sustain learner motivation and engagement.
  - a. Prepares use of various instructional methods and delivery that accommodate different learning styles, capacity, key personality characteristics, diverse backgrounds, demographics, access, and levels of expertise and experience.
5. Plans for the social, emotional, and physical comfort needs of the participants.

#### **B. Instructional Methods and Delivery Skills**

1. Identifies and discusses the difference between problems/opportunities the training is intended to address (i.e. knowledge and skill deficiencies) and non-training aspects that impact the training (i.e. system barriers, outside support).
2. Explains links between old and new learning.
3. Creates a safe and engaging learning environment.
  - a. Uses and reinforces confidentiality agreements.
  - b. Utilizes supportive engagement strategies to develop an investment in the training.
  - c. Collaborates and partners with participants to increase engagement.
  - d. Asks questions that expand thinking and create possibilities.
4. Provides clear instructions for all activities verbally, visually, and demonstratively.
5. Assesses and addresses the potential impact of mandated attendance.
  - a. Explains the importance of the investment in training for personal growth.
  - b. Identifies impact of missed classes on requirements i.e. credentialing, licensing, promotions, organizational goal achievement.

**ACTO Coach Trainer Competency Task Force**  
**April 19, 2017**

6. Identifies negative and potentially damaging transgressions and dynamics and makes use of appropriate interventions promptly.
  - a. Employs appropriate strategies and interventions to engage participants who are uninvolved, disengaged, or resistant.
  - b. Manages unforeseen situations (e.g. conflict, disruptive participants, embarrassment/shame, extreme emotional states, unanswerable questions).
7. Expresses genuine concern for others' well-being and development.
  - a. Demonstrates open acceptance and respect for all inclusive of gender, race, ethnic, religious, age, disability, socioeconomic status, and/or sexual orientation.
8. Creates a positive group climate that includes beginning the engagement process by using techniques such as name tags/ tents, ice-breaker exercises, introductions, and other activities.
  - a. Creates a comfortable cross-cultural climate that encourages all to participate.
  - b. Models active and reflective listening to facilitate group discussion.
  - c. Acknowledges participants' achievements and successes in the learning process.
9. Utilizes awareness of the impact of personal appearance, physical positioning, hand and body movements, use of a podium or table, and vocal clarity, pace, tone, volume, and inflection to enhance the quality of the presentation and receptivity.
10. Monitors and evaluates the impact of the design, content, flow, presentation, and methodology on the participants' learning and engagement in the moment and adjusts accordingly.
  - a. Uses presentation materials to be clear and on point.
  - b. Enlivens presentations with stories, examples, humor, analogies, metaphors, and interesting facts.
  - c. Uses exercises to reinforce key points.
  - d. Creates opportunities for reflection.
  - e. Utilizes verbal enhancers that more fully communicate and explain essential concepts and information including examples, illustrations, creative phrasing, analogies, quotations, rhetorical questions, and comparing and contrasting concepts.
  - f. Uses summarization, bridging, and segues to preserve continuity when moving between segments of the training.
  - g. Employs strategies to keep the group focused, on task, and within established time frames, while remaining responsive to group needs and concerns.
11. Manages and supports participants in their individual learning needs.
  - a. Ensures that instructional resources are accessible to all learners.
  - b. Evaluates participants' understanding frequently.
  - c. Maintains participants' attention.
  - d. Anticipates learner difficulties and their questions.
12. Manages transitions between the roles of coach, facilitator, and expert.

**ACTO Coach Trainer Competency Task Force**  
**April 19, 2017**

**C. Transfer of Knowledge and Skills**

1. Builds trust and rapport as demonstrated by participants openly engaging in discussion and sharing in class.
2. Identifies opportunities, activities, and experiments to promote both retention and transfer of knowledge and skills before, during, and after the training.
3. Expresses confidence in the abilities of the participant to learn and apply new skills.

**D. Evaluation**

1. Provides ongoing opportunities for participant feedback of the training and delivery.
2. Explains and uses a standardized process, guidelines, and related materials for instructors' and participants' assessment of knowledge and skills.
3. Monitors participants' ability to apply relevant concepts, theory, and principles.
  - a. Makes recommendations for participants' improvement.
  - b. Gives more positive feedback than remedial action to participants.
  - c. Gives feedback that makes a difference to participants' learning skills.
  - d. Gives feedback to participants that considers their developmental focus, learning style, and level of vulnerability.

**E. Technology Use and Management**

1. Practices using the technology in advance.
  - a. Manages the logistics and mechanics of using the technology.
  - b. Prepares for possible problems during delivery.
2. Integrates technology to augment learning.

**F. Distance Learning**

1. Manages and troubleshoots the technologies being utilized.
2. Supports participants' use of the technology and troubleshoots difficulties they encounter.

**G. Standards for Instructors**

1. Documents qualifications to perform their assigned tasks in the delivery and evaluation of learning events.
  - a. Continually updates knowledge and skills in the subject matter, materials, learning methods, and best practices.
  - b. Documents continuing education to remain current in subject matter material and learning methods.
2. Reflects professionalism through appearance, language, preparedness, behavioral and coaching standards, and models the application of the content.
3. Adheres to copyright laws.

**ACTO Coach Trainer Competency Task Force**  
**April 19, 2017**

4. Discloses proprietary/outside business interests and commitments that relate to the components of the training program to the learners prior to the start of the training so there is no conflict of interest by the trainer.

\*\*\*\*\*

Sources:

- Institute for Human Services/NARCCW 2 Trainer Competencies
- ATD competencies
- ibstpi trainer competencies
- IACET trainer competencies
- ACTO trainer competencies

## **Part II**

### **Compilation of Additional Competencies Recommended for Coach Trainers**

#### **Domain 1. Personal and Interpersonal Competencies for Coach Trainers**

To be effective in the classroom, Coach Trainers need a baseline and continual practice of self-development, awareness of cultural bias, ethical practices, and modeling coaching competencies such as establishing trust and intimacy and presence while they are training. The trainer must engage in continuous self-care and self-mastery -- maturity, psychological, emotional, physical, and spiritual.

##### **A. Self-Reflection and Awareness**

1. Regularly practice self-care to increase the capacity to care for others.
2. Believe in the potential of the students, to know they are creative, resourceful, and capable of learning and growing at varying levels.
  - a. Demonstrate a heartfelt desire to support the learner in surpassing the trainer's abilities.
  - b. Demonstrate ease when the students are confused or anxious about shifting from "advising" and "directing" to a coaching mindset.
3. Be comfortable with ambiguity (not-knowing how things will turn out) to ensure confidence when demonstrating coaching and using an inquiry-based coaching approach to teaching.
4. Notice and manage emotional triggers that could negatively impact the classroom environment. For example, the trainer's need for attention, recognition, or control could hinder spontaneous and meaningful interactions with the students.
  - a. Recognize trigger points and know how to choose their reactions and subsequent behaviors.
  - b. Harness emotional energy to empower the learning.
5. Facilitate discussion of emotionally-charged topics and issues during the training, and confidently manage the emotional level of the group to maintain a safe, objective, and comfortable training environment.
6. Identify personal strengths and weaknesses in coaching and training and create development plans for ongoing learning and growth.
7. Participate in continuing education to develop both coaching and training knowledge and skills.

**ACTO Coach Trainer Competency Task Force**  
**April 19, 2017**

**B. Awareness of Cultural Bias (with culture taking in all aspects of lifestyle, race, age, gender, status, religion, education, sexual orientation, etc.)**

1. Recognize how his/her cultural background may affect his/her ability to identify values, attitudes, and beliefs of students from different cultural groups.
2. Model having an open mind and a willingness to learn from the students, and encourage constructive dialogue about cross-cultural characteristics.
3. Differentiate stereotyping from culturally relevant information, and facilitate discussions of the negative impact of stereotyping and bias on interactions in the classroom as well as in coaching.
4. Treat learners as social equals without the need to prove oneself, impress, or be superior.
5. Recognizing differences and appreciating everyone's potential for contribution and creativity.

**C. Professionalism and Ethics**

1. Adhere to and clearly recount the ethics and standards of practice of the coaching profession, and address and reinforce these in all training activities including maintaining appropriate confidentiality, privacy, and self-disclosure.
2. Abstain from teaching any coaching competencies or scenarios in which the trainer lacks sufficient knowledge, skill, and/or first-hand experience.

**D. Model Coaching Presence and Flexibility**

1. Partner with students to create mutual respect by practicing what is taught—i.e. principles of coaching rather than lecturing to.
2. Create a space of trust and intimacy by staying curious and caring in stressful or emotional situations. Act objectively in difficult situations rather than impulsively or emotionally.
3. Model empathy by perceiving, reflecting, and inquiring about the feelings and attitudes of the students during classroom discussions and activities.
4. Differentiate one's own issues from that of the learner.
5. Maintain presence by allowing for confusion and disagreements, knowing that discomfort often accompanies high-level learning.
  - a. Remain motivated to accomplish the learning objectives in the face of adversity or obstacles.
  - b. Tolerate all reactions and turn conflict into problem solving events.
6. Take responsibility for the consequences of one's own actions and decisions. Do not blame mistakes or undesired outcomes on external circumstances or on others.
7. Evaluate future implications of current decisions and action; create the scenarios and outcomes of situations that could develop from decisions or plans of action.

**ACTO Coach Trainer Competency Task Force**  
**April 19, 2017**

8. Sense the needs of students and invite them to declare what they need to move forward.
  - a. Adapt—relaxing control of timelines and agendas—by offering definitions, demonstrations, and exercises not defined in the curriculum but necessary to help achieve the desired outcome stated by the students.
  - b. Demonstrates vulnerability where it serves the group’s learning.

**E. Positive Learning Outlook**

1. Believe in each learners’ inherent capabilities and capacity to improve.
2. Recognize and acknowledge learner progress, good practice, and effort, whether successful or not.
3. Trusting, entrusting, and giving learners the chance to practice.



**ACTO Coach Trainer Competency Task Force**  
**April 19, 2017**

**Domain 2. Facilitation skills for Coach Trainers**

**Pre-requisites For Senior or Lead Coach Trainer**

1. Has been a practicing professional coach for a minimum of 3 years
2. Has earned money as a professional coach for a minimum of 3 years
3. Has demonstrated a passion for coaching and the coaching profession
4. Has primarily used their school's coaching model over the past 3 years

**A. Coach Mindset**

1. When demonstrating and teaching coaching, the trainer models and reinforces student behaviors that show they believe:
  - Coaching clients have their own best answers.
  - Coaching clients may have already completed/achieved a part of their desired goal.
  - Coaching clients are responsible for their success.
  - Coaching clients are at choice as to what and when they choose, to act or further reflection.
  - Coaching clients have different learning styles, thresholds
  - Coaching clients don't necessarily share my values or beliefs
  - As the coach – I do not claim to know my client's best learning journey.
  - As the coach – it is not my responsibility to rescue my clients from themselves for any reason. (i.e. morals, playing hero, judgments, etc.)

**B. Coach Definition and Practice**

1. Participate in ongoing experience of being a coaching client as well as being a coach
2. Articulate the underlying framework of professional coaching, and differences between coaching and:
  - Therapy, counseling
  - Consulting, advising
  - Managing
  - Parenting
  - Mentoring
  - Teaching
  - Leading

## **ACTO Coach Trainer Competency Task Force**

**February 23, 2017**

3. Articulate the mindset required for coaching.
4. Provide context for coaching, the coaching engagement and the coaching process.
5. Clearly explain coaching presence i.e. partnering, receiving, releasing bias and evaluation, respect for whole person, honor emotional expression. Also, model coach & client partnering while teaching and demonstrating coaching.
6. Tie tools and methods to specific coaching competencies, i.e. demonstrate how metaphor can be used to help articulate the measure of success of the desired outcome or in direct communications, to help the client frame their perceptions.
7. Exhibits the capacity to reconstruct the internal thought process and mindset of a master coach. Can answer the question when asked by students, “What was your thinking or reaction as the master coach?” (For PCC, as the experienced coach)

### **C. Facilitator of Coach Training Competencies**

1. Recognize and acknowledge coaching competencies when demonstrated.
2. Demonstrate masterful coaching presence – listening 100%, not distracted, doesn’t gloss over, fully present with sharer.
3. Customize coaching exercises or examples – be flexible in the moment.
4. Provide clear coaching examples for all coaching competencies.
5. Support students with common beginner coach struggles.
  - a. Demonstrate the ability to get into the learner’s shoes, adjusting expectations and acknowledgment to the level of experience of the learner.
  - b. Recognize when students do not understand and find new ways of explaining and demonstrating.
  - c. Share coaching wisdom and coaching knowledge so it’s understood and applicable.
  - d. Avoid jargon.
6. Provide examples (honoring confidentiality) from coaching clients, other students, and own experiences as a coaching client.
7. Knows and honors that his/her school’s coaching model is NOT the only coach model; and that other coach models have value and may serve different coach scenarios or coaching styles.
8. Recipient of coaching in the classroom recognizes the value and significance of coaching as well as the importance of the demonstration.

### **Domain 3. Knowledge of Group Dynamics**

Because coach training is delivered over a period of weeks, months, or years to a primarily consistent cohort, the coach trainer needs to demonstrate the ability to manage the classroom with group dynamics in mind. Additionally, the quality of interaction and support provided among the students is necessary to learning coaching skills. The Coach Trainer can then orchestrate the path of group development, incorporating group skills when teaching to enhance learning.

#### **A. Group Development**

1. Manages group process and development when the class forms as a cohesive group and when new students need to be integrated.
2. Identifies the indicators of group dynamics and can quickly adapt to the situation.
  - a. **Forming:** Uses “ice-breakers” and other techniques to encourage building relationship within the class/group
  - b. **Storming:** Establishes methods of handling interactive disturbances while also creating space for different perspectives
  - c. **Norming:** Actively supports students in their cooperation and continuing growth and learning together (i.e. highlights and supports positive interactions)
  - d. **Performing:** Encourages autonomy, unity and productivity by creating opportunities for sharing observations and challenging each other in growth enhancing environment while the educator steps back and monitors the interaction and progress
  - e. **Adjourning:** Understands the process of ending and prescribes it to the class and gives room for processing of the numerous emotions that are activated

#### **B. Group Functioning Phenomenon**

1. Identify specific group dynamics that affect the process of learning and integrate this awareness into the facilitation.
  - a. **Group Cohesiveness:** Promote a sense of unity and connection, which enhances the smooth running of the group/class.
  - b. **Group Think:** Identify when the consensus of the group/class is so strong that alternative perspectives, ideas and opinions are not appreciated or tolerated and then encourage disparate views and different possibilities.
2. Manages difficult situations in a coaching manner using reflection, inquiry, and trust in the class to find their own solutions.

## **Domain 4. Learning and Instructional Skills for Coach Trainers**

### **A. Plan and Prepare**

1. Reviews curriculum and identifies how it develops coaching-specific knowledge and skills.
  - a. Reviews learning objectives that define the coaching competencies to be demonstrated upon completion.
  - b. Reviews resources for use in coaching and in coaching programs or a coaching business.
2. Ensures there are opportunities to practice each coaching competency individually as well as multiple coaching competencies.

### **B. Instructional Methods and Delivery Skills**

1. Instructs participants on coach-specific knowledge that includes coaching competencies and ethics.
2. Provides opportunities for participants to apply coaching knowledge and practice coaching skills through:
  - a. Experiencing coaching, being coached, and observing coaching.
  - b. Exploring scenarios or examples from coaching sessions.
  - c. Observing live or taped demonstrations of coaching competencies followed by an opportunity to discuss and ask questions.
3. Engages participants in coaching discussions.
  - a. Invites questions and provides answers or coaches participants to think through possible answers.
  - b. Encourages participants to interact with one another on content, coaching situations, and learning or questions arising from their coaching work.
4. Models coaching competencies throughout the training program.

### **C. Transfer of Knowledge and Skills**

1. Creates opportunities for participants to practice coaching competencies both:
  - a. Throughout the Program and
  - b. Immediately after completing each training session.
2. Emphasizes the value of regularly practicing their coaching knowledge and competencies immediately after the training is completed.
3. Holds the participants accountable and helps them hold themselves accountable for meeting the program's standards and requirements.

### **D. Evaluation**

1. Provides the coaching evaluation document.
  - a. For participants to evaluate their own and others' coaching.

**ACTO Coach Trainer Competency Task Force**  
**February 23, 2017**

- b. For trainers to evaluate each participant on their demonstrated coaching competencies.
2. Observes participants' coaching sessions and provides feedback on strengths and developmental opportunities throughout the training.
3. Acknowledges and celebrates participants' learning and coaching successes.
4. Provides opportunities for participant feedback on the coach training and delivery during and upon completion of the program.
  - a. Provides the evaluation document for written feedback on the program.

**E. Technology Use by the Coach**

1. Learns about and practices using technologies for coaching delivery (for example: Skype, telephone, Zoom, etc.) prior to implementation in the training program.
2. Objectively describes the pros and cons of coaching using virtual technologies as compared to face-to-face for coaching.
  - a. Explains and answers participant questions on its use.
  - b. Ensures participants can successfully use the different technologies. Provides an opportunity for participants to practice using the technologies in advance of class.

**F. Distance Learning**

1. Identifies the pros and cons of using distance and face-to-face learning when teaching different aspects of coaching i.e. competency development, ethics and professional standards, self-care for the coach.
2. Identifies the difference in skills needed for distance learning instruction compared to face-to-face instruction in coach training.
  - a. Trains and practices using virtual technologies and distance learning techniques for teaching coaching skills before implementation.
  - b. Ensures training materials are designed for use by virtual technologies.

**G. Standards for Coach Trainers**

1. Demonstrates comprehensive knowledge of coaching competencies and ethics as evidenced by ICF specifications and/or other professional coaching associations i.e. EMCC, AC, CCE, IAC, WABC, APECS.
  - a. Provides updated documentation of coaching credentials and/or other professional coach certifications and coaching experience.
  - b. Clearly describes pathways to certification by professional associations.
2. Adheres to coaching ethics.
3. Continually updates knowledge and skills by reading coaching research and best practices, participating in continuing education, and incorporating new learning into teaching and class discussions.