**Coach others in the workplace**

**Assessment**

## Introduction

This document contains your assessment for the unit *NAT10898002 – Coach others in the workplace*. This is a nationally recognised enterprise unit which forms part of CJTS’s accredited Course in Field-based Training and Assessment (10898NAT).

To obtain a statement of attainment for this unit, you must complete the assessment and be deemed competent by your CJTS assessor.

A copy of the unit on which this assessment is based is provided in Appendix A of your manual.

## Assessment overview

This assessment consists of the following tasks:

1. On-course assessment questions
2. Post-course coaching relationship in the workplace
3. Workplace coaching review questions

Further information on the requirements for each of these tasks is provided later in this document.

## Assessment timeframe

It is important that you undertake your assessment as soon as possible after the completion of the course. As a general rule, the longer you leave your assessment, the less you will recollect of the knowledge and experience you gained on the course, and consequently the harder it will become to complete.

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| You are required to present your evidence for assessment within **3 months** of attending the course.If, for any reason, you are unable to complete the assessment within this timeframe, please contact Col Joy Training Services to request an extension before the time limit expires. **Phone:** (07) 4942 6311 **Email:** fbta@coljoytraining.com.au When requesting extension you must:* Clearly explain why the extension is required
* Propose a date by which you will be able to submit your assessment

A Col Joy Training Services consultant will advise you whether your request has been approved and note the revised due date for submission of your evidence on your student record. |

If you do not submit your assessment within the specified timeframe, you may be required to:

* resit the course at your own (or your organisation’s) expense; or
* provide additional evidence to demonstrate that you have retained the knowledge covered on the course and pay an hourly rate to have your evidence assessed

## Negotiating assessment

Where possible, the assessment tasks in this document have been designed to provide you with flexibility and choice in how you go about your assessment. However, Col Joy Training Services recognises that the assessment tasks described herein are not the only way of demonstrating competence. Should you wish to provide alternative evidence to demonstrate your competence, please discuss this with your CJTS assessor.

To ensure no misunderstandings occur, if you have negotiated any adjustments to the assessment requirements with your assessor, these must be documented and agreed to in writing by your assessor before you proceed. A copy of this documentation must be included with your assessment submission.

## Electronic copy of assessment document

An electronic copy of this assessment document can be downloaded from the Col Joy Training website. Instructions for accessing the document are provided below.

* Go to the Col Joy Training website ([www.coljoytraining.com.au](http://www.coljoytraining.com.au))
* Select “Menu button” -  - from the menu bar at the top right of the screen
* Select Downloads
* Select “Forms for post-course assessment”

If you are having trouble accessing the site, please contact CJTS administration for assistance.

## Support / assistance

Should you require any support / assistance when undertaking your assessment, you are invited to contact your facilitator or another Col Joy Training Services staff member. We will do our best to provide you with the guidance you need. Our contact details include:

Telephone number: (07) 4942 6311

Email address: fbta@coljoytraining.com.au

You are also encouraged to refer to your Participant Manual and to speak with representatives from your organisation’s training department.

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| Face-to-face coaching by a Col Joy Training Services consultant is available if required. Information regarding the current hourly rate payable for this service can be obtained from CJTS administration on the above telephone number or email address. |

## Presentation of evidence for assessment

All assessment tasks should be submitted to Col Joy Training Services in the form of a written or electronic portfolio. It is important that you:

* Carefully review the requirements for each task
* Provide all of the requested information / evidence for each task
* Compile your evidence for each task in sequential order
* Clearly label each task
* Ensure your portfolio is neatly presented

## Submitting your evidence

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| You may submit your evidence in hard copy or electronically. |

**Option 1 – Hard (paper) copy submission**

Hard copy submissions must be posted, or hand delivered to:

Col Joy Training Services

12 Fursden Street

Glenella QLD 4740

**Please retain a complete copy of your evidence for your own records.** Col Joy Training Services accepts no responsibility for materials which are lost or damaged. Having a copy of your completed assessment on hand is also important in case you receive a call from your assessor wanting to discuss / review certain aspects of your assessment with you.

Please note that Col Joy Training Services does not return assessment paperwork at the completion of the assessment process. It is generally archived for a short period of time before being disposed of.

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| For administrative purposes, it is requested that after placing the pages of your assessment paperwork in order, you secure them with a bulldog clip and / or use some elastic bands to hold the documents together.Please do not:* bind your assessment paperwork
* place each sheet in a separate plastic sleeve
* place your assessment in a file

✓✓* staple all of the pages together
 |

**Option 2 – Electronic submission**

Electronic submissions must be emailed to the CJTS email address: fbta@coljoytraining.com.au

When submitting electronically, please make sure you:

* Submit your whole assignment (i.e., all assessment tasks) at one time
* Submit all assessment tasks in the correct order, as per the Assessment Checklist
* Include your on-course assessment task (Task 1) as well as all post-course tasks
* Scan both sides of all pages
* Use the following subject heading in the submission email: “*Your name, Course name, Electronic assessment submission”*

e.g., **Subject:** Joe Bloggs, Coach others in the workplace, Electronic assessment submission

## Plagiarism

Plagiarism is a form of cheating. It is taking and using someone else's thoughts, writings or inventions and representing them as your own.

Plagiarism includes activities such as:

* Handing in evidence copied from another student
* Presenting the work of another individual or group as your own work
* Submitting evidence without adequate acknowledgement of sources used, including assessments taken totally or in part from the internet
* Submitting documents developed by others in your workplace / organisation and claiming that they were developed by you

Plagiarism is a serious act. Participants found to have plagiarised any part of their evidence will be assessed as ‘not yet competent’ and all course fees will be forfeited.

Should you have any doubts about including the work of other authors in your assessments, please consult with your facilitator.

## Assessment of your evidence

After your evidence has been received by Col Joy Training Services, we will pass it to a qualified assessor (normally your course facilitator) who will assess it against the requirements of the relevant competency standard.

The assessor will contact you (probably by telephone or email) if they require you to clarify any of your evidence or provide additional evidence. In some cases, the assessor may also contact your supervisor or your organisation’s training coordinator to obtain additional information, clarification or verification.

Candidates who have been assessed as competent are provided with written feedback via email.

## Re-assessment and appeals

Candidates whose first submission does not demonstrate competency are provided with at least one opportunity to adjust and re-submit their evidence.

If your assessor deems your evidence to be unsatisfactory on your first attempt, they will advise you of the additional evidence they need you to provide, as well as the timeframe for gathering the additional evidence and how they wish you to present it. In some cases the assessor may recommend additional training prior to re-assessment.

If you do not resubmit your evidence within the requested timeframe, or your resubmission does not meet the requirements for competency, your assessor may deem you **not yet competent**. You will be advised of this decision in writing.

Should you be dissatisfied with the assessment decision, you should initially take this up with your CJTS assessor. If you remain dissatisfied, you are invited to discuss the matter with CJTS’s Principal. Should you remain dissatisfied and wish to pursue the matter further, you may lodge a formal appeal. The assessment appeal form can be downloaded from the CJTS website or you can request CJTS administration to provide you with a copy. Appeals must be lodged within one-month of receiving your assessment decision.

## Certification

Candidates are entitled to receive a statement of attainment upon successful completion of this assessment. If your employer has paid for you to attend this course, your statement of attainment will generally be posted to you, care of your employer.

## Feedback

Col Joy Training Services welcomes your feedback on this assessment. Some options for providing feedback include:

* Sending an email to your facilitator or to fbta@coljoytraining.com.au
* Telephoning your facilitator or a CJTS consultant on (07) 4942 6311
* Attaching a note to your assignment at the time of submission

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| **Coach others in the workplace****Assessment Cover Sheet** |
| **Units of competency:** | NAT10898002 – Coach others in the workplace |
| **Date of workshop you attended:** |   |
| **Name of CJTS facilitator:** |   |
| **Your name:** |   |
| **Date of birth:** |   |
| **Your address:** |     |
| **Company / organisation:** |   |
| **Phone:** |  *(work)* *(home)* |
| **Phone (mobile):** |   |
| **Email:** |   |
| **Declaration and confidentiality agreement** |
| * I have been advised of the assessment requirements, have been made aware of my rights and responsibilities as an assessment candidate, and choose to be assessed at this time.
* I declare that the work presented in this evidence portfolio is my own and that no part has been copied from another person, or written for me by another person, except where due reference is made. I am aware that a false declaration may lead to the withdrawal of my certification.
* I agree to allow Col Joy Training Services to discuss the progress / results of my assessment with my supervisor or a representative from my organisation should this be required.
* I give permission for Col Joy Training Services to use my evidence for assessment moderation / validation purposes.
* I declare that I have kept a copy of this evidence portfolio for my own records and in case the evidence submitted gets lost or damaged in transit.
 |
| **Signature:** |   | **Date:** |   |
| If you have any queries regarding the completion of this assignment, please contact Col Joy Training Services: **Phone:** (07) 4942 6311 **Email:** fbta@coljoytraining.com.au |

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| **Coach others in the workplace****Assessment Checklist** |
| **Candidate name:**  |
| Use this checklist to ensure all parts of your assessment are complete. Submit a copy of the checklist with your assessment paperwork.Ensure the assessment paperwork you submit is in the same order as this checklist.All parts of all Assessment Tasks must be completed satisfactorily for an overall result of ‘competent’. |
| **Evidence summary** |
| *Candidate use***Provided****(✓)** | **Description** |
| **Assessment Task 1 – On-course assessment questions** |
|[ ]  All questions must be answered correctly |
| **Assessment Task 2 – Post-course coaching relationship in the workplace** |
|[ ]  2.1 – Instructions for workplace support person*An appropriate support person has been selected**The support person has signed Form 2.1* |
|[ ]  2.2 – Coaching preparation form*Must demonstrate thorough preparation for coaching**All parts of Form 2.2 must be complete**Must be signed by support person* |
|[ ]  2.3 – Coaching plan and record form*Must show the topics / content / skills to be covered by the coaching.**Must show that the coaching occurred over a significant period of time (a duration of at least 3 days)**Must include at least 3 coaching sessions which have a combined duration of at least 2 hours**Must include at least 3 meetings with the person being coached - an initial meeting, review meeting and close out meeting* |
|[ ]  2.4 – Record of initial meeting*Form 2.4 must be completed in full to show what was discussed during the meeting**Must be signed by coach and learner**Must be signed by support person* |
|[ ]  2.5 – Support person feedback on coaching*Form 2.5 must be completed by support person to confirm that they observed the coach provide quality coaching* |
| *Candidate use***Provided****(✓)** | **Description** |
|[ ]  2.6 – Record of review meeting *Form 2.6 must be completed in full to show what was discussed during the review meeting* *Each part of the form must include comments / notes made by the coach* *Must be signed by coach and learner* *Must be signed by support person* |
|[ ]  2.7 – Support person feedback on coaching (same as 2.5) *Form 2.7 must be completed by support person to confirm that they observed the coach provide quality coaching* |
|[ ]  2.8 – Record of close-out meeting *Form 2.8 must be completed in full to show what was discussed during the meeting* *Must be signed by coach and learner* *Must be signed by support person* |
|[ ]  2.9 – Coaching evaluation form *Form 2.9 must be completed and signed by the learner* |
|[ ]  2.10 – Coaching self-review form *Form 2.10 must be completed by the coach and must show evidence of serious self-reflection* *Must include identification of areas for improvement* |
|[ ]  2.11 – Supporting documentation *Form 2.11 must be used to record examples of supporting documentation provided* *Any supporting documentation listed must be attached behind Form 2.11* |
| **Assessment Task 3 – Workplace coaching review questions** |
|[ ]  3.1 – General principles of learning *Must describe how you applied the general principles of learning in the coaching you provided. Answers must be legible.* |
|[ ]  3.2 – Questions about coaching provided in the workplace*Must provide clear answers for each question (a – d). Answers must be legible.* |
| **Other requirements** |
|[ ]  **Workplace Assessment Cover Sheet** is completed in full(including signature). |
|[ ]  The assessment tasks and any supplementary evidence is **clearly labelled** and compiled in a logical manner. |
|[ ]  I have made a copy of the entire assessment for my own records and have put this in a safe place. *Make sure this is readily accessible in case you receive a call from your assessor to discuss certain aspects of your assignment.* |
| *Sections below this line are for completion by a CJTS Assessor* |
| **Note for assessors:** To achieve a satisfactory result for an assessment task, the candidate must complete all parts of that task satisfactorily. To be deemed competent in the unit covered by this course, the candidate must complete all assessment tasks satisfactorily.  |
| **CJTS assessor’s comments on assessment tasks:** |
| **Assessors** **signature:** | **Date:** |

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| **ASSESSMENT TASK INSTRUCTIONS** |

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| **Assessment Task 1 – On-course assessment questions** |

For this Assessment Task you are required to complete and submit the on-course assessment questions. These are generally printed on green paper and located at the end of your Learner’s Guide.

Full instructions for completing this assessment task are provided on the first page of the on-course assessment questions document.

**Note:** Even if your questions have been marked during the course, you must still submit them with the rest of your assessment documentation.

###### **Insert your On-course assessment questions (green sheets) behind this page**

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| **Assessment Task 2 – Post-course coaching relationship in the workplace** |

For this Assessment Task you are required to demonstrate your ability to coach another person in the workplace. Your coaching should focus on helping the other person to develop job specific skills, knowledge and attitudes.

For the purpose of this task, the coaching must be more than a one-off skills-based or knowledge-based training session. It must:

1. Be conducted over a significant period (i.e., 3 or more days); and
2. Consist of 3 or more related sessions, with a total of at least 2 hours of coaching time (e.g., 3 x 40 minute coaching sessions; or 6 x 20 minute coaching sessions, etc). The learner should be provided with time to practice and consolidate skills between each session.
3. Include an initial meeting, at least one review meeting, and a close-out meeting with the learner (these are in addition to the 2 hours coaching time)

It is recommended that you speak with your supervisor or training coordinator to identify a suitable person to be coached.

A detailed breakdown of the requirements for this assessment task is provided below. If the instructions do not make sense, or you are unable to meet one or more of the requirements, please contact CJTS for advice.

Note that you will need to use some forms to provide evidence for this assessment task. Copies of the forms are provided in this assessment pack but may also be downloaded from the CJTS website. Download instructions are provided on page 2.

| **Assessment Task 2 – Steps to take** |
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| 2.1 | **Arrange a support person**Identify a person who can support / mentor you in the workplace as you undertake this assessment. This person should be someone who is familiar with your organisation’s training / coaching requirements and has experience as a workplace coach – for example, your manager, the site training manager, training coordinator or training advisor.Seek agreement from this person to be your support person and get them to complete Form 2.1.If you require more than one support person (e.g., due to rostering arrangements) you must make additional copies of Form 2.1 and get each additional support person to read and sign this form. |
| 2.2 | **Prepare for workplace coaching*** Identify who you will coach and what you will coach them in
* Discuss and confirm the purpose of the coaching with your support person and any other relevant people from your organisation (e.g., the learner’s manager)
* Access and review organisational documentation relating to the subject being coached
* Seek background information about the learner to be coached, including their needs and characteristics

Document your preparations using Form 2.2 (Coaching preparation form) and arrange for your support person to sign the form. |
| 2.3 | **Prepare written coaching plan**Prepare a coaching plan which includes a list of what the coaching needs to cover. This should be documented on Form 2.3.You are permitted to use suitable coaching materials from your organisation to help develop your plan. You may also obtain assistance from your support person and / or others in your organisation to develop your plan.The plan must show the following:* the topics / content / skills to be covered by the coaching.
* that the coaching occurred over a significant period of time (at least 3 days)
* at least 3 distinct coaching sessions which have a combined duration of at least 2 hours
* at least 3 meetings with the person being coached (an initial meeting, review meeting and close-out meeting)
 |
| 2.4 | **Initial meeting**Hold an initial meeting with your learner, ensuring that you cover all of the information on Form 2.4 (Record of initial meeting).It is important that you have Form 2.4 with you when conducting your meeting, and that you fill out the form at the time of the meeting.

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| Important.jpg | You must ensure that your support person observes you conducting this meeting and provides feedback in the space provided at the bottom of Form 2.4. |

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| 2.5 | **Begin coaching the learner**Begin coaching your learner in accordance with the coaching plan developed for Task 2.3Sign off the relevant parts of the coaching plan as they are completed (including dates completed).

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| Important.jpg | You must arrange for your support person to observe you conducting at least 15 minutes of coaching during this step, or during step 2.7. They must document their observation on Form 2.5 |

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| 2.6 | **Review meeting**Hold at least one formal review meeting with the learner at an appropriate time during the coaching relationship. Use Form 2.6 (Record of review meeting) to help structure this meeting and to provide information about what was discussed.It is important that you have Form 2.6 with you when conducting your meeting, and that you fill out the form at the time of the meeting (Part C may be filled out before the meeting).**Note:** If appropriate, you may decide to hold additional review meetings. Please document each of these meetings separately using Form 2.6.

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| Important.jpg | You must ensure that your support person observes you conducting this meeting and provides feedback in the space provided at the bottom of Form 2.6. |

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| 2.7 | **Continue coaching the learner**Continue coaching your learner in accordance with the coaching plan developed for Task 2.3. Make adjustments to your coaching, if necessary, to address any issues identified during the review meeting.Sign off the relevant parts of the coaching plan as they are completed (including dates completed).

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| Important.jpg | You must arrange for your support person to observe you conducting at least 15 minutes of coaching during this step, or during step 2.5. They must document their observation on Form 2.7. |

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| 2.8 | **Close-out meeting**When you are ready to conclude the coaching relationship, conduct a close-out meeting with your learner. Ensure that, as a minimum, you cover all of the items listed on Form 2.8. Keep a record of your meeting using Form 2.8 (Record of close-out meeting). It is important that you have Form 2.8 with you when conducting your meeting, and that you fill out the form at the time of the meeting.

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| Important.jpg | You must ensure that your support person observes you conducting this meeting and provides feedback in the space provided at the bottom of Form 2.8. |

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| 2.9 | **Learner evaluation**Arrange for your learner to evaluate the coaching you provided using Form 2.9 (Coaching evaluation form). |
| 2.10 | **Review your performance as a workplace coach**Reflect upon and review your performance as a workplace coach, taking into account the feedback provided by your learner and your support person. You must provide evidence of thorough self-reflection and you must identify areas in which you can improve.Document your review using Form 2.10 (Coaching self-review form). |
| 2.11 | **Supporting documentation**Provide a copy of any supporting documentation used when preparing for and delivering the coaching. Examples could include:* Coaching logbook
* Coaching notes / diary entries
* Organisational training documentation completed as part of the coaching (e.g., training and assessment booklet)
* Email correspondence with learner or support person
* Completed safety forms (e.g., Take 5, Pre-start form, etc)
* Relevant pages from operating manuals relating to the subject being coached
* Relevant pages from training documentation relating to the subject being coached

Please record any supporting evidence provided on Form 2.11.  |

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| Form 2.1 – Instructions for workplace support person |
| **Introduction**Thank you for agreeing to support a candidate from your workplace to undertake the post-course assessment tasks for the unit *NAT10898002 – Coach others in the workplace*. This unit is from CJTS’s nationally accredited *Course in Field-based Training and Assessment*.The unit applies to one-on-one coaching relationships conducted over a significant period of time and / or multiple sessions, rather than a one-off skills or knowledge-based training session.**Requirement to be a support person**To perform the role of support person for this assessment, you should be familiar with your organisation’s training requirements and have experience as a workplace coach. For example, you could be the candidate’s manager, the site training manager, training coordinator or training advisor. Your role will be to provide support and guidance to the candidate and oversee parts of the coaching process undertaken by the candidate to verify that a quality coaching process took place.**Overview of assessment task**The candidate is required to demonstrate their ability to coach another person in the workplace. To meet the requirements of the unit, the coaching must:* Focus on helping the person being coached to develop job specific skills, knowledge and attitudes; and
* Be conducted over a significant period of time (i.e., 3 days or more); and
* Consist of 3 or more related sessions with a total of at least 2 hours coaching time

**What support do I need to provide?**You can support the candidate to undertake this assessment by:* Helping them to identify a suitable person to be coached
* Helping them to plan the coaching, then meeting with them to discuss and confirm their readiness to commence the coaching relationship (you will need to sign Form 2.2 – Coaching preparation form)
* Helping them to prepare a coaching plan which includes a list of what the coaching needs to cover (Form 2.3 – Coaching plan)
* Ensuring the candidate is given the time and any other resources needed to carry out the coaching activities
* Observing the candidate conduct an initial meeting, review meeting and close out meeting with the person they are coaching (you will need to sign Forms 2.4, 2.6 and 2.8)
* Observing the candidate coach the learner for at least 15 minutes and providing feedback on Form 2.5/2.7
* Answering any questions the candidate may have along the way, and providing them with feedback, tips and advice
* Checking that the candidate records the coaching in accordance with organisational requirements
* Helping the candidate to reflect upon and review their performance as a workplace coach
* Checking the candidate’s answers to the *Workplace Coaching Review Questions* (Assessment Task 3)
* Helping to make sure the candidate has completed all of the requirements of the assessment in accordance with the instructions and that their documentation is complete and has been compiled correctly
 |
| **Further information**Should you have any concerns about the requirements of the assessment or wish for further information, please contact Col Joy Training Services on (07) 4942 6311 or email fbta@coljoytraining.com.auPlease note that a Col Joy Training Services assessor may contact you should we require additional information to assist in making our assessment decision. |
| **Your details**Please provide the information below. |
| Your name: |  |
| Your position: |  |
| Organisation: |  |
| Your phone no: |  | Your email address: |  |
| Name of candidate (coach): |  |
| Work relationship to the candidate: |  |
| Approximate length of time you have worked with the candidate: |  |
| **Declaration*** I have read and understood the instructions in this document
* I have experience as a workplace coach and knowledge of the organisation’s coaching requirements, and consider myself to be an appropriate support person for the candidate
* I agree to support the candidate by meeting with them when required and ensuring that they are completing quality coaching in accordance with organisational requirements
* I understand that, if I am unsure about any of the requirements of the assessment or my role as a support person, I can contact CJTS using the details provided above
 |
| Name: |  | Signature: |  | Date: |  |

**Note:** If the candidate will require more than one support person (e.g., due to rostering arrangements), a copy of this form should be completed by each support person.

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| Form 2.2 – Coaching Preparation Form |
| **Coach’s name:** |
| **Instructions**This form is to be completed by the workplace coach and reviewed with the support person.Ensure you provide as much detail and explanatory information as possible. |
| **Coaching purpose and scope** |
| Who will you be coaching (person’s name and job role)? |
| Why does this person need coaching? |
| What are the objectives of the coaching? *(i.e., what does the learner need to be able to do by the end of the coaching?)* |
| List the key things that the coaching needs to cover |
| List all of the tools or equipment that will be needed for the entire coaching plan |
| Over how many days do you expect to coach the learner? |
| How frequently do you expect to meet with the learner for coaching sessions and for how long? (e.g., daily, weekly, and how many hours per day?) |
| How many meetings are you planning on having with the learner? (minimum requirement is initial meeting, review meeting and close-out meeting). You might decide on having more than one review meeting if the learner is inexperienced at the task. |
| Where will the coaching take place? *Please be as specific as possible.* |
| **Background information about the learner** |
| What previous training has the learner received in relation to the subject being coached? (e.g., compulsory on boarding training related to the task) |
| Does the learner have any language, literacy or numeracy support needs? (If YES, please provide details)How did you confirm this? |
| Does the learner have any other needs which need to be taken into account? (If YES, please provide details)How did you confirm this? |
| **Organisational documentation** |
| What technical procedures / supporting documentation relates to the activity being coached? (e.g., Standard operating procedures). *Please list full document numbers and names.* |
| [ ]  Tick to confirm that you have accessed, read and understood the technical procedures / supporting documentation |
| What training materials (e.g., manual, handouts, workbook, PowerPoint presentation, etc) are available / needed to support the coaching?*Please list full document numbers (where relevant) and names.* |
| [ ]  Tick to confirm that you have accessed, read and understood the training materials |
| What policies / procedures does the organisation have that are relevant to workplace coaching? (e.g., Workplace coaching procedure)*Please provide full document numbers and names.* |
| [ ]  Tick to confirm that you have accessed, read and understood the organisation’s workplace coaching policies and procedures |
| What records need to be kept of the coaching?  |
| [ ]  Tick to confirm that you have accessed any required coaching record forms |
| **Support person review**Please meet with your support person to review the information in this document and confirm that you are ready to provide the coaching. |
| Tick to confirm that you have discussed and understand the following:[ ]  Purpose and scope of the coaching[ ]  Learner needs and characteristics[ ]  Equipment needed[ ]  Learning resources / materials to be used[ ]  Organisation’s technical procedures relating to the subject being coached[ ]  Organisation’s policies, procedures and forms relevant to workplace coaching[ ]  Organisation’s record keeping requirements for workplace coaching |
| **Support person declaration**I confirm that I have met with the coach and discussed the points listed above. I confirm that the coach is well prepared to provide the coaching. |
| Name: |  | Signature: |  | Date: |  |
| If you have not already done so, please support the candidate to prepare Form 2.3 – Coaching Plan and Record Form. |

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| Form 2.3 – Coaching plan and record form |
| **Instructions**Use this form to document a plan showing what the coaching will cover, and to record information about completion of coaching activities. If you wish, you may adapt the form to suit your needs.You are permitted to use suitable coaching materials from your organisation to help develop your plan. You may also obtain assistance from your support person and / or others in your organisation.As a minimum, the coaching plan should include:* All meetings held with the learner (Initial meeting, Review meeting(s), Close out meeting)
* Information about what will be covered during each coaching session (topics, content and sequence of delivery)
* Information about the duration of the coaching (must be 3 or more days, and consist of 3 or more sessions that build on one another which have a combined duration of at least 2 hours coaching time)
* Information about when the learner will practice and consolidate skills between coaching sessions (where relevant)
 |
| **Name of coach:** |  |
| **Name of learner:** |  |
| **Coaching objectives***Short description of what the learner needs to be able to do by the end of the coaching* |

| **Planning information** | **Completion record** |
| --- | --- |
| **Date** | **Topic** | **Content / skills to be covered** | **Estimated time needed** | **Date completed** | **Coach’s initials** |
|  | Initial meeting | * Introduction
* Find out about learner
* Discuss coaching plan
 | * Discuss ground rules
* Confirm that learner is ready to proceed
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| **Coach’s comments***Coach to provide comments on the learner’s performance upon completion of the coaching.* |
| **Coach’s declaration***I confirm that all aspects of this coaching plan are complete and that the learner is ready to perform the work covered by this plan.* |
| **Coach’s signature:** |  | **Date:** |  |

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| Form 2.4 – Record of initial meeting |
| **Instructions**Hold an initial meeting with your learner, ensuring that you cover all of the information on this form. Ensure that you tick each box 🗹 as each item is discussed and that you make notes in the spaces provided.It is important that you have this form with you when conducting your meeting, and that you fill out the form at the time of the meeting.**You must ensure that your support person observes you conducting this meeting** and provides feedback in the space provided at the bottom of the form. |
| **Name of coach:** |  |
| **Name of learner:** |  |
| **Date of meeting:** |  |
| **Meeting agenda** |
| **Introduction** |
| [ ]  Explain reason for the meeting[ ]  Introduce yourself and tell the learner about your experience with the subject matter[ ]  Introduce the support person and their role in the process[ ]  Discuss the coaching objective(s) with the learner |
| **Find out about the learner** |
| [ ]  | Find out about the learner’s previous background and experience relevant to the subject matterMake notes in the space below |
| [ ]  | Has the learner completed any previous training relevant to the subject matter?

|  |  |
| --- | --- |
| [ ]  YES | [ ]  NO |

If YES, provide details below

|  |  |  |
| --- | --- | --- |
| **Description of training** | **When completed** | **Learner comments on training** |
|  |  |  |
|  |  |  |
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 |
| [ ]  | How does the learner prefer to learn?

|  |  |
| --- | --- |
| [ ]  Watching others demonstrating first (Visual learner) | [ ]  Hands on – having a go themselves (Kinaesthetic learner) |
| [ ]  Listening to instructions and discussions (Auditory learner) | [ ]  Other (provide comments below) |

 |
| **Discuss coaching plan** |
| [ ]  | Give a copy of the coaching plan to the learner and explain the content to them |
| [ ]  | Discuss the expected duration of the coaching |
| [ ]  | Explain the purpose of the review meeting and close out meeting, and when you expect them to occur

|  |  |
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| Expected review meeting date: |  |
| Expected close out meeting date: |  |

 |
| [ ]  | Discuss how you will monitor the progress of the learner |
| [ ]  | Discuss what will happen at the end of the allocated coaching time |
| [ ]  | Advise the learner about any assessments to be administered during the coaching or at the end of the coaching processProvide details below |
| [ ]  | Does the learner have any feedback on the coaching plan or suggestions for how it could be improved?Provide details below |
| [ ]  | Confirm the learner is ready to proceed with the coaching |
| **Discuss ground rules**What behaviour is expected of the learner and coach during the training? |
| **Learner** [ ] Be on time[ ] Follow instructions[ ] Wear correct PPE[ ] Let the trainer know if unsure of anything[ ] Be respectful to the coach | **Coach**[ ]  Be on time[ ]  Support the learner[ ]  Be respectful to the learner[ ]  Discuss any concerns issues with the learner[ ]  Provide regular feedback |
| Note any other ground rules discussed |
| Note any other items discussed during the meeting |
| Coach and learner to sign below to confirm that this meeting occurred and that the items listed above were discussed. |
| **Coach’s signature:** |  | **Date:** |  |
| **Learner’s signature:** |  | **Date:** |  |
| **Support person feedback on Initial meeting** |
| Tick to confirm that you observed the following:[ ]  Meeting was held between coach and learner[ ]  Coach was supportive of the learner[ ]  Coach explained all points on the agenda clearly, and in full[ ]  Coach used appropriate listening skills and checked the learner’s understanding throughout the meeting[ ]  Coach encouraged and responded appropriately to questions from the learner |
| What was the estimated duration of the meeting? |
| Observations of the coach during the meeting *What did they do well? Where could they improve?* |
| **Support person sign off** |
| Name: |  | Signature: |  | Date: |  |

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| Form 2.5– Support person feedback on coaching |
| **Instructions for support person**Please observe the candidate for at least 15 minutes while they are providing coaching to their learner. You will need to observe the candidate providing explanations and demonstration to the learner, asking and responding to questions, monitoring the candidate’s learning, etc.Please complete the checklist below and write comments in the space provided.At the end of your observation, discuss your feedback with the candidate, including providing them with guidance on how they can improve their coaching.Should you have any concerns about completing this form or wish for further information, please contact Col Joy Training Services on (07) 4942 6311 or email fbta@coljoytraining.com.au  |
| **Name of support person:** |  |
| **Name of coach:**  |  |
| **Name of learner:**  |  |
| **Date of session observed:** |  |
| What was the topic of the coaching you observed? |
| What was the approximate amount of time that you observed the candidate coaching the learner? |
| Please confirm whether the candidate: |  |
| * Provided clear explanations and demonstrations to the learner
 | [ ]  Yes [ ]  No |
| * Gave the learner opportunities to practise skills and / or apply knowledge
 | [ ]  Yes [ ]  No |
| * Encouraged the learner to ask questions and gave them opportunities to do so
 | [ ]  Yes [ ]  No |
| * Helped build the learner’s confidence
 | [ ]  Yes [ ]  No |
| * Monitored the learner’s performance and provided feedback and support
 | [ ]  Yes [ ]  No |
| Please comment on the performance of the candidate in providing coaching to their learner, including areas for improvement.*Please provide at least 3 sentences. Use the back of this form if more space is needed.* |
| Support person’s signature: |  | Date: |  |

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| Form 2.6 – Record of review meeting |
| **Instructions**Hold a review meeting with your learner, ensuring that you cover all of the information on this form. Ensure that you tick each box 🗹 as each item is discussed and that you make notes in the spaces provided.It is important that you have this form with you when conducting your meeting. Part C of the form may be filled out before the meeting. The other parts of the form should be filled out during the meeting.**You must ensure that your support person observes you conducting this meeting** and provides feedback in the space provided at the bottom of the form. |
| **Name of coach:** |  |
| **Name of learner:** |  |
| **Date of meeting:** |  |
| **Part A – Review what the learner has achieved so far** |
| [ ]  Refer to the coaching plan and confirm with the learner which areas they have successfully completed |
| **Part B – Seek feedback from the learner on how they feel they are going** |
| How does the learner feel they are progressing?  |
| In which areas does the learner feel that they have done particularly well? |
| Which areas does the learner feel they need to work on the most? |
| **Part C – Provide feedback to the learner***The coach may write feedback notes before meeting the learner* |
| Coach’s comments to the learner on how the learner is progressing. |
| Coach’s comments on what the learner has done |
| Coach’s comments about what the learner needs to continue to work on |
| **Part D – Seek feedback from the learner on the coaching provided so far** |
| What does the learner like most about how the coaching is being delivered? |
| What does the learner feel that the coach could do differently to meet the learner’s needs or learning style preferences? |
| If any issues or concerns have been raised by the learner or the coach, discuss what can be done to address them. For example:* Can the coach change anything about how they are delivering the coaching?
* Can the coach provide additional support?
* Is additional time able to be provided?
* Is there someone else who could assist?
* Is there something that the learner could do differently?
 |
| Coach and learner to sign below to confirm that this meeting occurred and that the items listed above were discussed. |
| **Coach’s signature:** |  | **Date:** |  |
| **Learner’s signature:** |  | **Date:** |  |
| **Support person feedback on Review meeting** |
| Tick to confirm that you observed the following:[ ]  Meeting was held between coach and learner[ ]  Coach was supportive of the learner[ ]  Coach explained all points on the agenda clearly, and in full[ ]  Coach sought feedback from learner[ ]  Adjustments for improving the coaching arrangements were agreed to where necessary |
| What was the estimated duration of the meeting? |

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| Observations of the coach during the meeting *What did they do well? Where could they improve?* |
| Has the coach been maintaining records of the learner’s progress throughout the coaching, in accordance with the organisation’s requirements? | [ ]  Yes [ ]  No |
| **Support person sign off** |
| Name: |  | Signature: |  | Date: |  |

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| Form 2.7 – Support person feedback on coaching |
| **Instructions for support person**Please observe the candidate for at least 15 minutes while they are providing coaching to their learner. You will need to observe the candidate providing explanations and demonstration to the learner, asking and responding to questions, monitoring the candidate’s learning, etc.Please complete the checklist below and write comments in the space provided.At the end of your observation, discuss your feedback with the candidate, including providing them with guidance on how they can improve their coaching.Should you have any concerns about completing this form or wish for further information, please contact Col Joy Training Services on (07) 4942 6311 or email fbta@coljoytraining.com.au  |
| **Name of support person:** |  |
| **Name of coach:**  |  |
| **Name of learner:**  |  |
| **Date of session observed:** |  |
| What was the topic of the coaching you observed? |
| What was the approximate amount of time that you observed the candidate coaching the learner? |
| Please confirm whether the candidate: |  |
| * Provided clear explanations and demonstrations to the learner
 | [ ]  Yes [ ]  No |
| * Gave the learner opportunities to practise skills and / or apply knowledge
 | [ ]  Yes [ ]  No |
| * Encouraged the learner to ask questions and gave them opportunities to do so
 | [ ]  Yes [ ]  No |
| * Helped build the learner’s confidence
 | [ ]  Yes [ ]  No |
| * Monitored the learner’s performance and provided feedback and support
 | [ ]  Yes [ ]  No |
| Please comment on the performance of the candidate in providing coaching to their learner, including areas for improvement.*Please provide at least 3 sentences. Use the back of this form if more space is needed.* |
| Support person’s signature: |  | Date: |  |

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| Form 2.8 – Record of close-out meeting |
| **Instructions**Hold a close-out meeting with your learner, ensuring that you cover all of the information on this form. Ensure that you tick each box 🗹 as each item is discussed and that you make notes in the spaces provided.It is important that you have this form with you when conducting your meeting, and that you fill out the form at the time of the meeting.**You must ensure that your support person observes you conducting this meeting** and provides feedback in the space provided at the bottom of the form. |
| **Name of coach:** |  |
| **Name of learner:** |  |
| **Date of meeting:** |  |
| **Meeting agenda** |
| [ ]  Discuss what the learner has achieved[ ]  Confirm that all of the required coaching activities have been successfully completed and all of the necessary content / skills have been covered[ ]  Check whether the learner has any outstanding issues that they would like to discuss[ ]  Provide the learner with final feedback about their performance[ ]  Confirm that the coaching is complete and, where relevant, that the learner feels ready to move onto the next stage (e.g., if the coaching is to be followed by an assessment, does the learner feel ready for this?)[ ]  Ensure all coaching records / paperwork have been completed, including:* Form 2.3 (dates, signatures, and coach’s comments)
* All organisation specific coaching documentation, coaching logs, etc (where relevant)

[ ]  Give coaching evaluation form (Form 2.9) to learner to complete[ ]  Thank the learner for their participation in the coaching |
| **Notes** |
| If the learner has disclosed any outstanding issues that are unable to be resolved and / or does not feel ready to move onto the next stage, please provide explanatory notes below. |
| Coach and learner to sign below to confirm that this meeting occurred and that the items listed above were discussed. |
| **Coach’s signature:** |  | **Learner’s signature:** |  |

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| **Support person feedback on Close-out meeting** |
| Tick to confirm that you observed the following:[ ]  Meeting was held between coach and learner[ ]  Coach was supportive of the learner[ ]  Coach discussed all points on the agenda clearly, and in full |
| What was the estimated duration of the meeting? |
| Observations of the coach during the meeting *What did they do well? Where could they improve?* |
| Did the coach accurately complete / finalise all of the necessary coaching records and lodge them in accordance with the organisation’s requirements? | [ ]  Yes [ ]  No |
| **Support person sign off** |
| Name: |  | Signature: |  | Date: |  |
| **Note to support person:** Please assist the candidate by checking that all of their paperwork is complete and compiled correctly, and that you have signed off each form as required. |

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| Form 2.9 – Coaching evaluation form |
| **Name of coach:** |  |
| **Name of learner:** |  |
| **Instructions for the learner:**Please use this form to provide feedback on the quality of coaching provided to you by your coach. Please be honest in your feedback, as your coach will use this information to reflect upon and improve their performance. |
| **Please respond to each of the following statements by placing a tick in the appropriate box** | 1 = Strongly agree, 2 = Agree, 3 = Neutral, 4 = Disagree, 5 = Strongly Disagree, N/A = Not applicable |
| Excellent Poor |  |
| 1 | 2 | 3 | 4 | 5 | N/A |
| Clearly explained the purpose of the learning and the objectives to be achieved |  |  |  |  |  |  |
| Ensured that there were no risks to my health and safety |  |  |  |  |  |  |
| Was supportive and encouraging |  |  |  |  |  |  |
| Communicated clearly and effectively using language I could understand |  |  |  |  |  |  |
| Provided clear explanations and demonstrations |  |  |  |  |  |  |
| Listened to me and understood what I was saying |  |  |  |  |  |  |
| Asked questions to check my understanding |  |  |  |  |  |  |
| Encouraged me to ask questions and gave me opportunities to do so |  |  |  |  |  |  |
| Gave me constructive feedback |  |  |  |  |  |  |
| Showed respect for my background and expertise |  |  |  |  |  |  |
| Monitored my progress throughout |  |  |  |  |  |  |
| Identified when I was having difficulties and responded appropriately |  |  |  |  |  |  |
| Gave me enough opportunities to practise new skills |  |  |  |  |  |  |
| What did your coach do particularly well? |
| What (if anything) could your coach have done differently to make the coaching more effective? |
| **Learner signature:** |  | **Date:** |  |

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| Form 2.10 – Coaching self-review form |
| **Name of coach:** |  |
| **Name of learner:** |  |
| **Instructions** |
| This form is designed to gather evidence of your ability to critically review and evaluate the coaching that you have provided. Your responses must provide evidence of thorough self-evaluation and reflection. Make sure you take into account any feedback you received from the learner and your support person.  |
| Comment on whether the objectives / outcomes of the coaching were achieved and how you were able to judge this. |
|  |
| Comment on which aspects of the coaching you provided worked particularly well? What were you most pleased with? *Please write at least 3 lines.* |
|  |
| What could have been done better? Include your thoughts on how to do it better next time.*You must identify at least one thing that could have been improved to make your coaching more effective. This could relate to your preparation for the coaching, the structure of the coaching, the content covered, the support provided, time allocated, resources used, your coaching skills, etc.**Please write at least 3 lines.* |
|  |
| Comment on the coaching relationship. What could you have done to improve how you related to and supported the learner?*You must identify at least one thing that could have made the coaching relationship more effective. This could relate to your communication skills (e.g., listening, explaining, providing feedback), the time taken to get to know the learner, etc.**Please write at least 3 lines.* |
|  |

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| Form 2.11 – Supporting documentation |
| Provide a copy of any supporting documentation used when preparing for and delivering the coaching. Examples could include:* Coaching logbook
* Coaching notes / diary entries
* Organisational training documentation completed as part of the coaching (e.g., training and assessment booklet)
* Email correspondence with learner or support person
* Completed safety forms (e.g., Take 5, Pre-start form, etc)
* Relevant pages from operating manuals relating to the subject being coached
* Relevant pages from training documentation relating to the subject being coached

Provide a list of the supporting documentation you have provided below and attach the documentation behind this form. |

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| **Assessment Task 3 – Workplace coaching review questions** |

For this assessment task, you are required to answer some questions relating to the coaching you provided for Task 2. Your Participant Manual is a valuable source of reference information and may be useful for helping to answer any questions you are unsure about.

Should you choose to handwrite your answers, please ensure your writing is legible. Should you wish to type your answers, you may download a copy of this document from the CJTS website (see download instructions on page 2).

Your assessor will contact you regarding any questions you have answered incorrectly or if you have provided insufficient information.

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| **3.1 General principles of learning**The following table lists the general principles of learning that were discussed during the course (refer Section 2 of your Participant Manual). Provide examples / explanations of how you applied each of these principles for the coaching you provided in the workplace.You may wish to refer back to your Participant Manual to check the definition of each principle before answering this question. |
| **Principle** | **Example / explanation of how I applied this principle in my coaching sessions** |
| 1. Active involvement
 |  |
| 1. Meaningful material
 |  |
| **Principle** | **Example / explanation of how I applied this principle in my coaching sessions** |
| 1. Multiple sense learning
 |  |
| 1. Primacy and recency
 |  |
| 1. Practice and reinforcement of learning
 |  |
| 1. Feedback
 |  |
| 1. Reward
 |  |
| **3.2 Questions about the coaching you provided in the workplace**Complete the following questions relating to the coaching you delivered for Assessment Task 2. For each question you should aim to write at least 3 lines. |
| 1. How did you monitor the progress of your learner throughout the coaching relationship?
 |
| 1. How did you record the progress of your learner throughout the coaching relationship?
 |
| 1. How did you sequence the learning so that the learner could build their knowledge and skills?
 |
| 1. What did you do to help build the learner’s confidence?
 |
| 1. Provide at least 2 examples of cues you were looking for which might have indicated that your learner was dissatisfied or was having difficulties with the learning. How did you respond / how would you have responded if you observed these cues?
 |
| **Example 1** |
| **Cue** |  |
| **How did you respond / how would you have responded?** |  |
| **Example 2** |
| **Cue** |  |
| **How did you respond / how would you have responded?** |  |