Guideline: How to perform Follow-up Coaching Visits?

Follow-up Coaching Visits to workshop participants aim to accompany participants (coaches) and support them in conducting a training session. He/she gets guidance and feedback about the specific knowledge, skills and abilities he/she learnt during a S4D workshop.

The “Follow-up Coaching” process contains several aspects:

Coaching: the qualified trainer/teacher will be accompanied and supported in his/her implementation process. He/she gets guidance and feedback about the specific knowledge, skills and abilities he/she learnt during the TS workshop.

Evaluation: quantitative and qualitative data will be collected; it gives information and feedback about implemented aspects of the method and other aspects learnt during the workshop, strengths and weaknesses of the person and the method, challenges, needs, use of the manual etc.

Research methods and instrument:

A mixed method approach can be used (see M&E Tool for Follow-up Coaching Visit); it contains observation (quantitative and qualitative parts) and interview parts. At the second (and third) visit the instrument should be slightly modified. It is important to use similar methods and instruments to generate comparable data.

Steps to be followed for the follow-up coaching visits are

1. Selection of persons who would conduct the follow-up visit with participants (e.g. workshop facilitator, partners)
   → At best, the visits are conducted by the same person(s) to assure comparability.
2. Selection of workshop participants (coaches) to be visited (sample per region, organization etc.)
   → While it is not possible to visit all qualified coaches, criteria for the selection process must be developed (e.g. coaches of certain regions).
3. Selection of date and time for visit
   → At best the follow-up visit occurs three times: 4-8 weeks, 3-4 months and 6 months after a workshop.
4. Carrying out a follow-up coaching visit during a training session offered by coaches
5. Feedback to and support of coaches (see: Guidelines for Giving Constructive Feedback)

1. PREPARATION

Pilot of the instruments

- Check the instrument (M&E Tool for Follow-up Coaching Visit):
    - Items and/or questions are missed/can be deleted?
    - Practical application?
- Make revisions and adjustments if and where necessary

Choose the right person(s) to perform the visits!

- "Ideal situation": The visits should be performed by two persons
    1. One person for the "Coaching" (instructor: person who has carried out the workshop)
    2. One person for the evaluation (consultant: knowledge in M&E)
- The person(s) has/have to be the same person(s) if more than one visit will be conducted (to assure comparability!)
- The person(s) has/have to be (an) expert(s) in the S4D method XXX
- The person(s) has/have to know feedback techniques

2. IMPLEMENTATION OF THE VISIT (No.1)

➔ If possible, the 1st visit has to be implemented 4-8 weeks after a workshop! (same intervals necessary for comparability reasons)

➔ Use of M&E Tool for Follow-up Coaching Visit

Introduction - Get comfortable with the coach!

- Communicate transparently the objective of the visits:
    1. to **empower**/to support the coaches
    2. to get **insights** and **feedback** on the implementation process of the method (what went well/challenges; critique etc.) in order to **improve** processes and contents
- The coach should feel free to open up!

The observation

- "Ideal situation": The observation should be performed by two people (the instructor and the evaluator/consultant) and compared afterwards.
- Please rate the following aspects (3= Optimal Perfect; 2= Okay; 1= Needs Improvement) and use the column "comments" to explain/justify your evaluation

Interview and Feedback

General aspects:

- The interview/feedback should be conducted/given in a calm, relaxed environment.
- It should be recorded and transcribed (by DSHS) afterwards.

This part aims...

➔ at assessing the training (coach perspective → self evaluation)
➔ at giving **feedback** (see Guidelines: Giving Constructive Feedback)
➔ at getting insights into the implementation process of the workshop contents
➔ at the use of the manual
➔ at getting an impression about future prospects

FEEDBACK part:

1. Write down your general impressions of the training
2. Give **feedback** (see Guidelines: Giving Constructive Feedback) after the training session, based on what you have you observed in terms of the 4 main aspects (ca. 15 min.)
3. **Discuss together** with the coach: What should be improved the next time?
4. Agree with the coach on 3-5 aspects which she/he can work on/improve until the next visit:
   - **Written agreement**: The aspects have to be written down by both (the observer AND the coach)

3. IMPLEMENTATION OF VISIT No. 2 (if possible)

➔ If possible, the 2nd visit has to be implemented 6 weeks - 3 months after the first visit (same intervals necessary for comparability reasons)
➔ Use of M&E Tool for Follow-up Coaching Visit → make revisions and adjustments if and where necessary:

- **STEP 1**: “Please transfer the aspects you agreed on with the coach during the first visit before you visit the coach for the second time in the M&E Tool (focal points of observation).”

- **STEP 2:** “Please observe if the coach implement the agreed aspect in his training session.”

- **STEP 3**: “Please talk with the coach about the agreed aspects”

- **STEP 4:** “Please give a feedback on the agreed aspects, if there was an improvement or not.”

Comparison of the results (visit no.1 → visit no. 2):

- Sum up the ratings: How did the coach develop from visit no. 1 to visit no. 2?
- What was easy difficult for the coach to implement? → Way forward?
- What went well/what didn’t, what are strengths and challenges?