



MID-CAREER COACHING PROGRAM

**A Faculty Development Program from the Utah
Coaching and Advancement Network (UCAN) at
the University of Utah School of Medicine**

CONTRIBUTING CO-AUTHORS: HARRIET W. HOPF, MD, FUHM, FASA, ANTONIUS TSAI, MBA



ABOUT THE PROGRAM

The Mid-Career Faculty Coaching Program (MCC) provides coaching to University of Utah Health mid-career faculty to facilitate professional growth, career reinvention, and access to leadership roles. After an early career focus on developing professional identity, establishing a brand, and getting promoted, mid-career faculty often find themselves asking, “What is my legacy?” and “What’s next?” How can they refresh their work to sustain interest and enthusiasm? What leadership opportunities should they explore and what is required to get there? This program pairs a mid-career faculty member with a senior faculty member who is an experienced leader to complete a systematic coaching process to assess “what’s next” and define the path to get there.

The MCC Program is open to SOM faculty members at the rank of associate professor or professor, who have been on the faculty for 7-15 years and are interested in pursuing leadership roles or exploring a new direction. The program has three components: Senior Leadership Coaching, Peer Coaching, and Leadership Interviews. The Program will pair a senior faculty member in a coaching capacity with a mid-career faculty member to complete a systematic process of assessment and career planning over a three- to four-month period. This program has been structured to allow meaningful engagement between a coach and coachee with minimal additional training. Coaching dyads may also incorporate formal assessments (e.g., 360 Assessments) into the reflection and assessment phase.

Coaches and coachees in the program will focus on “Three Conversations” through reflection, decision, and action:

- *Who am I and who do I want to be?*
- *Where do I want to go?*
- *How do I get there? What is the next step?*

Program Goal

The program goal is to increase participants’ clarity on professional direction, provide opportunities to build social capital, and build a community within the coaching cohort.



OVERVIEW OF THE STRUCTURE OF THE PROGRAM

The program consists of three components: Senior Leadership Coaching, Peer Coaching, and Leadership Interviews.

SENIOR LEADERSHIP COACHING (PP. 5-17)

Coachees will complete a reflection before each session to help them prepare for the conversation; see Module A (p. 9), 1a (p. 11), 2a (p. 13), and 3 a (p. 15). Conversations are expected to be completed over the course of 3-4 meetings. Module B (pp. 10-16) includes recommended topics for each of the three conversations (1b p. 11, 2b pp. 13-14, 3b, pp. 15-16), which are intended as a guide, but are not prescriptive. Coachees will complete a reflection after each session to help them synthesize and implement what they learned.

Conversation One (Commitments/Goals and Assessment, pp. 10-12) incorporates two sections; coaching pairs may wish to divide the conversations across two sessions. The first section is intended to establish the commitments and goals of the coaching engagement, which are crucial for developing trust and determining the focus. The second section focuses on assessment, that is, the coach should listen, clarify, support, challenge, and guide the coachee to reflect more deeply and refine the area of focus to prepare for Conversations Two and Three.

Conversation Two (Decisions, pp. 13-14) focuses on goals and direction: given the insights from the assessment in Conversation One, where does the coachee want to focus their effort and leadership going forward, and what will they want to stop doing to make that possible?

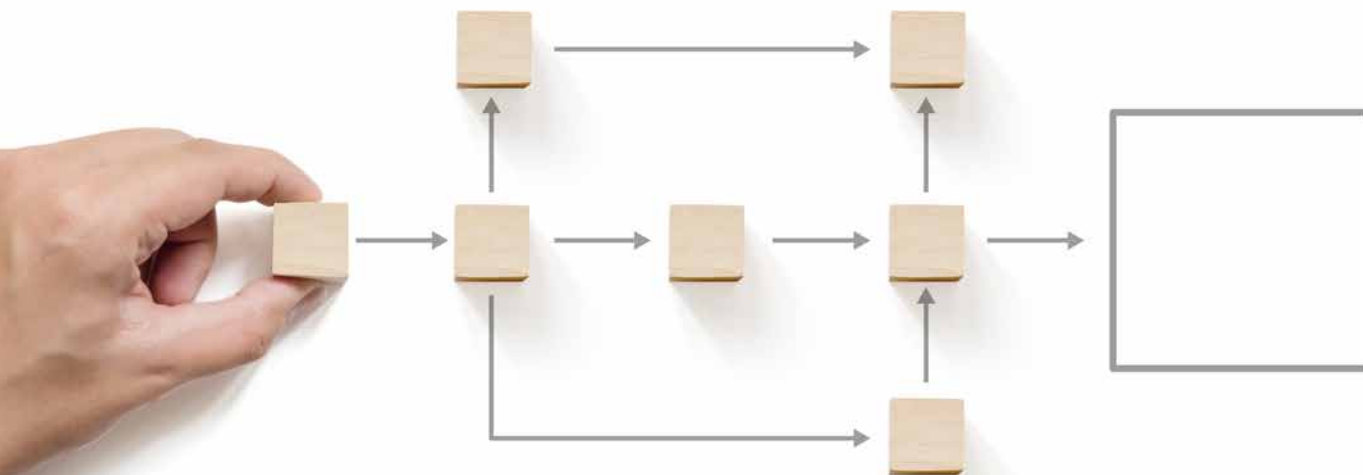
Conversation Three (Commitment to Action and Closure; pp. 15-17) incorporates two sections. The first section (3b) focuses on next steps and accountability for making progress toward the goals identified in Conversation Two. In Module C (p. 17), the coaching pair then formally closes the engagement by reviewing progress, reflecting on how the initially stated goals have been transformed into a plan of action, and discussing preferences and options for continued connection.

PEER COACHING (PP. 18-20)

Coachees will attend three structured peer coaching sessions facilitated by the UCAN directors. Depending on schedule compatibility, the cohort may be divided into two groups to facilitate continuity within each learning community. Participants will coach each other on current challenges and goals as a way to build community and trust. Each cohort will be encouraged to continue as a learning community once the program has ended.

LEADERSHIP INTERVIEWS (PP. 21-29)

Coachees will interview senior leaders to better understand paths to leadership and institutional structure, as well as to build social capital and visibility. In consultation with their coach and the UCAN Directors, participants will identify 3-5 senior leaders who are positioned to provide valuable insights and help build a non-insular, boundary-spanning network. Recommended questions are structured to facilitate a rich discussion and facilitate the creation of a connection with the senior leader.



OBJECTIVES OF THE COACHING PROGRAM

A growing community of faculty in the UUSOM are engaged in a movement to promote the practice of coaching. Through the practice of coaching, we will together transform the culture towards greater empathy, purposefulness, and leadership. The program will promote a coaching culture at the UUSOM, building greater empathy, purposefulness, and leadership.

MID-CAREER FACULTY MEMBERS WHO COMPLETE THE PROGRAM WILL:

- Develop clarity about career direction through reflection, exploration, decision, and action
- Build institutional knowledge and social capital through leadership interviews, Experience suggests participants build social capital with their coach as well and peer coaching, which will facilitate connection with career opportunities and sponsorship
- Connect with organizational peers and develop professional networking ability

SENIOR LEADER COACHES WHO COMPLETE THE PROGRAM WILL:

- Hone coaching skills and gain experience as a coach
- Develop their leadership skills through the coaching process

As you enter positions of trust and power, dream a little before you think. ~ Toni Morrison

ROLES AND EXPECTATIONS

MID-CAREER FACULTY (COACHEES)

- Completion of the pre- and post-surveys
- Engage with the “Three Conversations” format
- Reflection and action between coaching sessions
- Full participation in the peer-coaching component
- Prepare and conduct at least 3 leadership interviews
- Debrief with MCC program about how to improve the MCC program

SENIOR LEADER COACHES

- Be available to meet three to four times with the coachee
- Ask questions using the “Three Conversations” framework, provide your perspective (you do not need to provide definitive answers to the coachees)
- Consult with coachee on selection of leaders to interview
- Minimal or no prep work is expected for coaching sessions; you can let the structure drive the process
- Debrief with MCC program about how to improve the MCC program

MCC PROGRAM

- Provision of MCC coaching framework
- Coaching skills training for senior coaches
- Facilitation of three peer coaching sessions
- Facilitation of leadership interviews
- Checking in with the coaches and coachees during the process
- QI for the MCC program

AN INTEGRATED APPROACH

The Mid-Career Faculty Coaching Program will apply an integrated approach, providing mid-career faculty members with opportunities to reflect on goals and develop clarity on next steps with senior leader coaches and peer coaches and opportunities to develop social capital through networking with senior leaders and peers. The process will be accomplished through personalized coaching by a senior faculty member, peer coaching with other members of the cohort, interviews with senior leaders, and, optionally, formal assessments.



PROGRAM TIMELINE (FOR MID-CAREER FACULTY COACHEES)

	SENIOR LEADER COACHING	PEER COACHING	LEADERSHIP INTERVIEWS	OTHER & ADMINISTRATIVE
MONTH 1	Meet with senior leader coach (Introduction & “Three Conversations”)	Meet with MCC Peer Group - facilitated by MCC program	Determine list of leaders to interview - in consultation with coach and MCC program directors	Complete pre-program assessment
MONTH 2	Meet with senior leader coach (“Three Conversations”)	Meet with MCC Peer Group - facilitated by MCC program	Conduct leadership interviews	
MONTH 3 (4 IF NEEDED)	Meet with senior leader coach (“Three Conversations”)	Meet with MCC Peer Group - facilitated by MCC program	Conduct leadership interviews	Complete post-program assessment
ONGOING	Contact based on mutual agreement	Contact based on mutual agreement		



Senior Leader Coaching



SENIOR LEADER COACHING

First and foremost, the coach is a senior faculty member with academic and leadership experience and an interest in facilitating reflection, decision, and action with a mid-career faculty coachee through the “Three Conversations.” The coach will listen, provide empathy, and explore details with clarifying questions that support reflection and a clear assessment of goals. Through a seasoned perspective and powerful questions, the coach will guide the coachee to make decisions, strategically sharing insights and advice to inform the process. The coach will challenge coachees to reflect more deeply and commit to action and will hold coachees accountable for follow through on next steps.

Professional coaching is a relatively new tool in academic medicine. Although it has long been used in business, in academic medicine it is gaining momentum as a catalyst for professional growth, career reinvention, and leadership development. Although most mid-career faculty have benefited from working with mentors, likely few have experience working with a professional coach. Coaching and mentoring are different, yet complementary, approaches to facilitating success of faculty members. Mentoring is usually a long-term relationship with binary expectations and responsibilities that focus on specific advice. Coaching is a limited engagement specifically designed to encourage reflection on identified values and goals within the context of institutional mission and resources, and result in a specific and actionable development plan.

Working with a professional coach can also expand one’s professional network; coaches can guide and encourage the building of social capital and increased access to leadership opportunities. Peer coaching communities can similarly build social capital and encourage collaborative, reflective goal-setting and purposeful action. Throughout their career, faculty need both coaching and mentorship.

While all of these activities benefit the coachee, the benefits to coaches are many, and frequently overlooked. Insights from the coachee often resonate for the coach. Coaching expands the coach’s network directly and sometimes also as a result of connections made through the coachee. A successful coaching engagement is rewarding and coaches commonly experience both satisfaction and an increased sense of purpose.

This program will focus primarily on coaching mid-career faculty, drawing goals and ideas from the coachee to support the alignment of career decision-making with the coachee’s values and goals. The coach and coachee will enter into an agreed upon engagement that incorporates reflection, one-on-one meetings, and semi-structured approaches.

THE ROLE OF THE COACH

One of the most important elements of a coaching relationship is that the coachee should be the director. This is not to say, however, that the coach has an unimportant role. The coach has the wisdom and expertise to facilitate the coachee’s consideration of personal values, goals, and intentions. The effective coach:

- **Actively listens and asks questions to clarify professional intentions**
- **Provides useful perspective regarding navigating career change and leadership roles.**
- **Facilitates the development of professional goals and a practical plan to achieve these goals**
- **Creates a comfortable and secure environment for self-reflection**
 - Promises and maintains confidentiality
 - Limits judgment
 - Focuses on the coachee not the coach
 - Demonstrates vulnerability (e.g., coach willing to share about their own life)
 - Communicates authenticity
- **Explores the receptivity of the coachee to persevere along a certain path**
- **Respects the choices of coachees and recognizes that they are ultimately responsible for their own life and career path**
- **Commits to a short-term engagement (e.g., 3 months) to help the coachee address the “Three Conversations” and commit to next steps**
- **Recognizes their own limitations as a coach, both professionally and personally, and knows when to refer the coachee to appropriate alternate resources.**

THE ROLE OF THE MID-CAREER FACULTY MEMBER (COACHEE)

The coachee is pursuing coaching to clarify career purpose and plan, with the investment of a faculty coach. Above all, the coachee must be authentically engaged. The successful coachee commits to:

- Be honest, transparent, and authentic
- Demonstrate a willingness to show vulnerability
- Articulate professional goals (and recognize areas that are not of interest)
- Show initiative during coaching meetings (active role)
- Commit the time and energy to coaching activities
 - Come prepared to the meetings (with intention), having completed assignments
 - Use the time with the coach productively
- Be professionally considerate of the coach
(It is better to postpone a meeting than come ill prepared or distracted)



SENIOR LEADERSHIP COACHING PROCESS & MODULES:

The coaching program is based on the “Three Conversations,” with a module dedicated to each conversation. It is recommended that coaching dyads complete the modules within a 3-month engagement. Dyads are also free to work outside the curricular modules to better address the goals identified in the assessment and reflection module. **It is highly recommended that coachees do reflective work in between sessions in order to make more effective use of the coaching time.**

The following is the summary of the **process** for Senior Leadership Coaching.

OPENING

	Recommended Timing	Notes
Module A: Pre-Work	Prior to Initial Meeting	Completed by mid-career faculty coachee
Module B: Introduction & Commitments	Initial Meeting	

THREE CONVERSATIONS

	Recommended Timing	Notes
Conversation 1: Reflection & Assessment (Reflection)	First month	
Conversation 2: Challenge & Support (Decisions)	Second month	
Conversation 3: Next Steps & Accountability (Action)	Third month	

CLOSING

	Recommended Timing	Notes
Module C: Closure	Final Meeting	



MODULE A: PRE-WORK

Prior to the initial meeting, the mid-career faculty coachees should reflect on the following three categories: career, burning questions, and coaching. The recommended time for Module A is a minimum of 30 minutes. It can be useful for the mid-career faculty to spend time synthesizing their reflections. They may also want to email their reflections to the senior leader coach prior to the session.

REFLECTION ON CAREER

What roles and projects (past or present) have been the most meaningful to me?	
What roles and projects (past or present) have been the least meaningful to me?	
Who are the people that I most care to positively impact?	
What issues in healthcare, academia, or society am I most interested in addressing?	
What approach toward making an impact is most natural and enjoyable for me?	

“BURNING QUESTIONS”

What question about my career am I most interested in exploring?	
What pre-occupies my mind these days about my future?	
What is the most important decision that is in front of me now?	

REFLECTION ON COACHING

What do I want to focus on during the coaching engagement?	
What are my desired outcomes for the coaching engagement?	

MODULE B: INTRODUCTIONS & COMMITMENTS

At the start of the initial meeting, the coaching dyad takes time to get to know each other, to add context and meaning to the coaching conversations. Each person should take about five minutes to tell their story. A useful framework is the past-present-future structure which can be found in Appendix A (pp. 33-34). After the sharing their stories, the dyad should discuss goals and commitments to the coaching process.

INTRODUCTIONS

Mid-Career Faculty Coachee	Senior Leader Coach

GOALS AND COMMITMENTS

Topic	What Is Mutually Agreed To
What are the stated needs of the mid-career faculty coachee?	
What are the key desired outcomes of the coaching engagement?	
What commitments does the senior leader coach make? (incl. How does the coach like to coach?)	
What commitments does the mid-career faculty coachee make?	
Other points of agreement:	

CONVERSATION 1: REFLECTION AND ASSESSMENT

Who am I and who do I want to be? (Reflection)

- What is my brand?
- Am I satisfied with my career direction? (Does it need 'refreshing'?)

1A. PRE-SESSION REFLECTION

(Prior to the Conversation 1 session, please complete Module A. Use the prompts and reflections of Module A as a starting point for Conversation 1.)

1B. COACHING SESSION

Proposed Outline of Conversation 1*

- Begin with Module B (recommended time: 20 min)
 - **Mid-career faculty coachee and senior leader coach introduce themselves and tell their stories (Appendix A provides a framework)**
 - **Coaching dyad discusses goals and commitments**
- Mid-career faculty coachee shares reflections from Module A; coach interrupts only for clarification (recommended time: 10 min)
- Coach asks coachee questions to help clarify the coachee's professional direction and satisfaction with the direction (recommended time: 20 min)

During the reflection and assessment phase, the primary focus is to collect the dots, rather than to connect the dots. The coachee will have completed some reflection and bring an area of focus to the first coaching session (see Module A). The role of the coach during Conversation 1 is to listen with curiosity, clarify, use powerful, open-ended questions to support and challenge the coachee, summarize and distill, and guide the coachee to reflect more deeply and refine the area of focus. Some powerful questions include: Tell me more about...; I notice...; What would success look like?

It's important for coaches not to make assumptions based on their own experiences; make sure you stay focused on the coachee's values and goals. Paying attention to facts, feelings, and values is useful in drawing deeper reflection and understanding from the coachee. Useful questions/responses might include:

- **Facts:** Why now? What is working? What is getting in the way?
- **Feelings:** As you share, what excites you? What worries you? What's the worst/best thing that could happen? I just noticed that...
- **Values:** Why is that important? What are you giving up? What are your must-haves?

- Coach focuses on asking questions and refrains from offering advice
- For ideas on how to respond and ask questions as a coach please see the box above:
 - **Coach summarizes what they have heard back to the coachee and the coachee responds (recommended time: 5 min)**
 - **Coaching Dyad discusses the agenda for the next session. (Recommended time: 5 min)**

**Note: Conversation 1, because it includes Introductions and Commitments, can take longer than an hour. The recommended times above are for a 1-hour meeting. If the dyad agrees, it may make sense to divide Conversation 1 into two sessions.*

1C. POST-SESSION REFLECTION

(To be completed by mid-career faculty coachee at the end of the second session)

Reflection Prompt	Reflection
What do I want the direction of my career to be?	
What is my 'brand'?	
What do I want to change?	



CONVERSATION 2: CHALLENGE AND SUPPORT

Where do I want to go?
(Decision)

- How do I focus my career more clearly?
- Is it time for a change in direction?
- How do I decide among different opportunities?

2A. PRE-SESSION REFLECTION

(To be completed by mid-career faculty coachee prior to the second session)

Reflection Prompt	Reflection
Where do I see myself 10 years from now?	
What are my (long-term) goals?	
What roles and projects would best help me meet my goals?	
What roles and projects should I hand off in order to create space for new ones?	

2B. COACHING SESSION

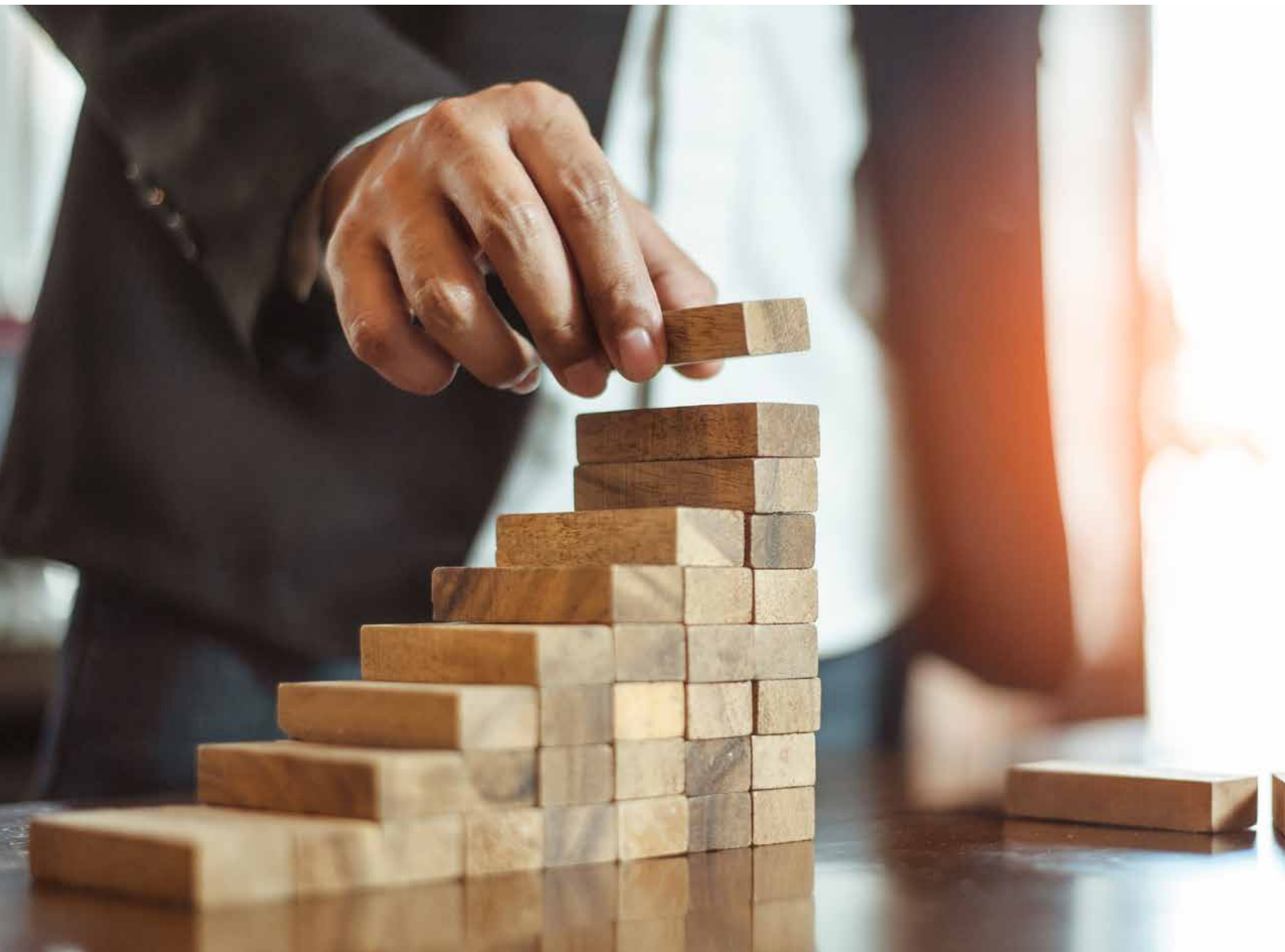
Proposed Outline of Conversation 2

- Mid-career faculty coachee shares reflections from **2a** above (recommended time: 5 min);
coach interrupts only for clarification
- Coach asks coachee questions to help coachees gain clarity on: (recommended time: 35 min)
 - **Where does the coachee want to be long-term?**
 - **What does the coachee see as the different options available, and how might the coachee make a decision?**
 - **What are other options that the coachee may not have considered?**
 - **What roles and projects should the coachee put more focus on in order to make progress towards the coachee's goals?**
 - **Remember - coaches should focus on asking questions ; a good rule of thumb is approximately two questions for every statement made by the coach**
 - **Don't get into a drawn out discussion on the "how;" focus on the goals and direction**
- Coach summarizes what they have heard back to the coachee and the coachee responds (recommended time: 5 min)
- Coaching Dyad discusses coachee's goals for leadership interviews and identifies potential leaders to interview (10 minutes)
- Coaching Dyad discusses the agenda for the next session. (Recommended time: 5 min)

2C. POST-SESSION REFLECTION

(To be completed by mid-career faculty coachee at the end of the second session)

Reflection Prompt	Reflection
What are my (long-term) goals?	
What opportunities should I focus on?	
How will I know if I'm successful?	



CONVERSATION 3: NEXT STEPS AND ACCOUNTABILITY

How do I get there?
What is the next step?
(Action)

- What role should I apply for?
- Who should I be connecting with?
- Application review / Interview practice

3A. PRE-SESSION REFLECTION

(To be completed by mid-career faculty coachee prior to the second session)

Reflection Prompt	Reflection
What are the steps required to achieve my goal?	
What is the next step to start on the path to success?	
How and when will I complete it?	
Who will hold me accountable?	
What did I learn from leadership interviews?	

3B. COACHING SESSION

Proposed Outline of Conversation 3

- Mid-career faculty coachee shares reflections from **3a** above (recommended time: 5 min); **coach interrupts only for clarification**
- Coach asks coachee questions to help coachees gain clarity on: (recommended time: 35 min)
 - Where is the focus for the next year?
 - What is the next role or project in the coachee's career advancement?
 - What are the next steps the coachees should be taking?
 - Who are the people the coachee should be connecting with?
 - What is the accountability system for the next actions?
 - Remember - coaches should focus on asking questions; a good rule of thumb is approximately two questions for every statement by the coach
- Coach summarizes what he or she has heard back to the coachee and the coachee responds (recommended time: 5 min)
- Coaching Dyad discusses **Module C**. (Recommended time: 15 min)

3C. POST-SESSION REFLECTION

Please process Module C together as a dyad. This can be done at the end of the Conversation 3 meeting or as a separate meeting.

MODULE C: CLOSURE

COMPLETING THE COACHING ENGAGEMENT

The International Coaching Foundation (ICF), includes in their coaching competencies: “Partners with the client to end the coaching relationship in a way that honors the experience.”

CLOSURE

(Questions that could be asked by the coach at the end of the Conversation 3)

Topic	Notes
What progress have you made on your original focus area? Has it changed?	
What have you accomplished? What was your biggest “win”?	
How are you – and your goals – different? What are you doing differently?	
What actions have you committed to take?	
How could the experience have been more useful for you?	
Discuss preferences and options for continued connection	

CONGRATULATIONS ON COMPLETING THE SENIOR LEADER COACHING COMPONENT!



Peer Coaching

Senior Leader
Coaching

Peer
Coaching

Leadership
Interviews

PEER COACHING

Mid-career faculty peers are among the most valuable sources of connection, perspectives, and support. The MCC program seeks to foster greater connection among peers through creation of a peer-coaching community within the cohort.

During the MCC program, there will be three structured peer coaching sessions for each MCC cohort. Senior leader coaches will not be present (they will have the opportunity to learn coaching skills during monthly UCAN workshops); facilitated by the UCAN directors, mid-career faculty will coach each other with the goal of building a cohort that could continue as a learning community once the program has ended.

- **Session 1: Creating a sense of community.** Participants will introduce themselves and will then be invited to share a current challenge or opportunity. Using the EPIC framework peers will provide coaching and community using open questions, support, and challenge. Participants may request their peers provide accountability if they decide on an action or next step.
- **Session 2: Building the community.** Participants will be invited to share an update on their challenge or opportunity, insights from their Senior Leader coaching sessions, and/or a new challenge or opportunity they would like to discuss. Using the EPIC framework, peers will offer coaching, support, and accountability.
- **Session 3: Extending the community.** If participants would like to extend the peer learning community, they will discuss mechanisms for doing so, and agree on commitment and accountability to the community. Participants may also choose to continue building the community, as in Session 2.
- **After the three structured group coaching sessions,** the peer group learning community is encouraged to continue to meet independently as mutually desired.

EPIC: a useful framework for providing support and peer coaching:

- **E**mpathy
- **P**erspective
- **U**seful Information
- **E**nCouragement

Issues that I want to bring up to my peers	What I learned or received from my peer session



Leadership Interviews



LEADERSHIP INTERVIEWS

Building social capital is an important component of the Mid-Career Coaching Program, because social capital is needed to succeed at “What’s next?”.

WHAT IS SOCIAL CAPITAL?

Social capital is the collective value of social networks and the benefits that flow from the trust, reciprocity, information, and cooperation associated with them. A network’s structure is more important than its size in predicting performance and success. A non-insular network, in which an individual invests in boundary-spanning relationships and is positioned at inflection points in organizational networks is particularly effective (<https://www.robcross.org/>). But how do you create such a network?

One effective tool for expanding non-insular networks is the leadership interview, a cornerstone of the Executive Leadership in Academic Medicine (ELAM) Program at Drexel University, a leadership development and network-building program for senior women leaders in the health sciences (<https://drexel.edu/medicine/academics/womens-health-and-leadership/elam/about-elam/>). Leadership interviews can introduce you to formal and informal leaders at your institution and help you build social capital. They provide you with an insider’s view of the organization and an understanding of how your leaders believe things get done and how they get them done.

During the MCC Program, you will have the opportunity to interview 3-5 institutional leaders with whom you would like to connect. The Program Directors and Senior Leader Coaches can help facilitate the connection. Because of the long history of ELAM Fellows at UUSOM and U Health, many leaders are familiar with and open to leadership interviews, either because they were ELAM fellows, or because they are routinely interviewed by ELAM fellows.

LEADERSHIP INTERVIEW GOALS

- Gain insights into your organization’s structure and function
- Meet and be met by senior leaders
- Raise awareness regarding new leadership opportunities



LEADERSHIP INTERVIEW PROCESS

1. Select leaders to interview: MCC coachees, in collaboration with their coach and the UCAN Directors, and aligned with the focus and goals of their coaching engagement, will identify 3-5 senior leaders to interview who are positioned to provide valuable insights and help build a non-insular, boundary-spanning network. Here are some considerations that may help you build the list:
 - Who are the titled leaders in your institution?
 - Who are the influencers in your organization-- the creators of networks and the holders of extensive social capital (regardless of title)?
 - Who are the owners of institutional history and knowledge?
 - Who are the current leaders in the roles to which you aspire?
 - Who are the leaders who have a role in selecting titled leaders?

Be creative in developing the list of leaders. What are areas of the institution you don't know much about? What skills will you need to build for your next role and who already has those skills?

- Chief Financial Officers at the program or department, college, Health Sciences, or institutional level; understanding finance is critical to any leadership role
- Education leaders (e.g., AVP, Associate Deans)
- Clinical leaders (e.g., CMO, AVP, Hospital leadership)
- Research leaders (e.g., Vice Dean, AVP, VP for Research)
- Leaders outside the institution (professional organization presidents, leaders in your field)
- Dean or SVP

Leadership Interview List: In the spaces below please write down names of senior leaders with whom you would like to conduct an interview. The MCC Program recommends doing interviews with three to five senior leaders. During this phase, write down the names of all the people with whom you might be interested in speaking.

In considering the names, you may consider people with whom you would like more exposure and connection, from whom you can learn valuable perspectives, and from whom there is the potential for future sponsorship. Discuss this list with your senior leader coach during conversation 2 as you narrow down the list to the final people you want to contact.

Leaders	What This Person May Provide	Desired Outcome

2. Contact the leaders and request a meeting: The coachee is responsible for organizing the meetings; coaches and the UCAN Directors can facilitate connections.

SAMPLE LANGUAGE:

I am writing to request some time with you. I am currently participating in the UUSOM Mid-Career Faculty Coaching program, which aims to increase participants' clarity on professional direction, provide opportunities to build social capital, and build a community of mid-career faculty.

I am requesting a 30 to 45 minute meeting for a Mid-Career Coaching program assignment. This assignment is intended to give me information regarding your personal perspective of the institution's dynamics and to learn more about your personal path to leadership. I know your schedule is jam packed but I hope we can find an opportunity to connect in the next few weeks.

3. Complete the interviews.

Sample Questions

- Please describe your career journey - what your major milestones have been, and what enabled you to be successful along the way.
 - What accomplishment do you consider to be the most significant? What are you most proud of? What do you hope to do in the future?
 - What is one characteristic that you believe every leader should possess?
 - How would you characterize your style of leadership? How did you develop this style?
 - If you could change one thing about the leadership culture, what would it be?
 - Who do you rely on for information in this organization?
4. Reflect on each interview. What did you learn? What surprised you? What opportunities did it make you aware of? How did it change your perception of the path to leadership and of the leader? Did it change your plans for your coaching engagement? Discuss these reflections with your coach in Conversation 3.
 5. Send a thank you.

SAMPLE LANGUAGE:

Thanks so much for your time last Friday! I really appreciated the opportunity to hear your story and was particularly impressed with your focus on relationship building as one of the keys to your success. The small (and large) expressions of appreciation for your colleagues, employees, and mentors clearly have made your journey successful and enjoyable.

I look forward to future opportunities to get together.

LEADERSHIP INTERVIEW 1

Name:

Process:

Contact

Interview

Reflect

Thank You

■ QUESTION 1:

■ QUESTION 2:

■ QUESTION 3:

■ QUESTION 4:

■ QUESTION 5:

■ OTHER NOTES:

Reflection on the Interview: What did you learn? What surprised you? What opportunities did it make you aware of? How did it change your perception of the path to leadership and of the leader? Did it change your plans for your coaching engagement?

LEADERSHIP INTERVIEW 2

Name:

Process:

Contact

Interview

Reflect

Thank You

■ QUESTION 1:

■ QUESTION 2:

■ QUESTION 3:

■ QUESTION 4:

■ QUESTION 5:

■ OTHER NOTES:

Reflection on the Interview: What did you learn? What surprised you? What opportunities did it make you aware of? How did it change your perception of the path to leadership and of the leader? Did it change your plans for your coaching engagement?

LEADERSHIP INTERVIEW 3

Name:

Process:

Contact

Interview

Reflect

Thank You

■ QUESTION 1:

■ QUESTION 2:

■ QUESTION 3:

■ QUESTION 4:

■ QUESTION 5:

■ OTHER NOTES:

Reflection on the Interview: What did you learn? What surprised you? What opportunities did it make you aware of? How did it change your perception of the path to leadership and of the leader? Did it change your plans for your coaching engagement?

LEADERSHIP INTERVIEW 4

Name:

Process:

Contact

Interview

Reflect

Thank You

■ QUESTION 1:

■ QUESTION 2:

■ QUESTION 3:

■ QUESTION 4:

■ QUESTION 5:

■ OTHER NOTES:

Reflection on the Interview: What did you learn? What surprised you? What opportunities did it make you aware of? How did it change your perception of the path to leadership and of the leader? Did it change your plans for your coaching engagement?

LEADERSHIP INTERVIEW 5

Name:

Process:

Contact

Interview

Reflect

Thank You

■ QUESTION 1:

■ QUESTION 2:

■ QUESTION 3:

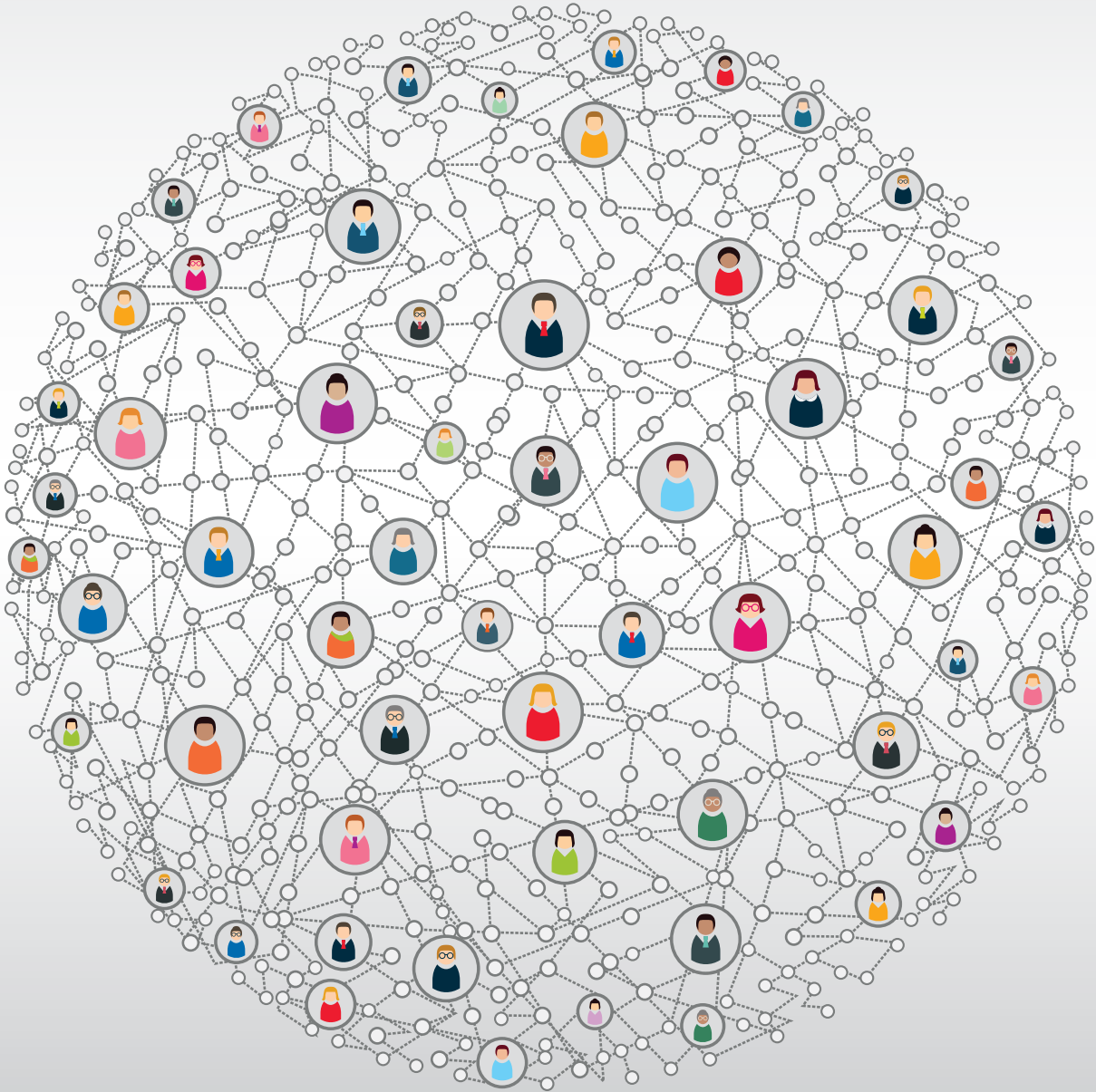
■ QUESTION 4:

■ QUESTION 5:

■ OTHER NOTES:

Reflection on the Interview: What did you learn? What surprised you? What opportunities did it make you aware of? How did it change your perception of the path to leadership and of the leader? Did it change your plans for your coaching engagement?

Other Resources



THE LEADER'S STORY (PART 1: PAST)

Past: Where did I come from?

1. Background
 - What was the most noteworthy or distinct aspect of your background?
 - What kind of kid were you?
 - How would you describe your relationship with your family?

2. Values
 - What was important to you growing up?
 - What kind of activities did you engage in that were meaningful?
 - Who did you look up to?

3. Formative Experiences
 - What was something you did or experienced which “shaped” you?
 - What was the biggest challenge you faced?
 - What was something you accomplished that you were most proud of?

THE LEADER'S STORY (PART 2: PRESENT)

Present: Why am I here?

4. Choices
 - Why did you choose to do the thing you are currently doing?
 - How did you tend to make choices?
 - Reflecting back on the choice, would you have done something differently?

5. Affiliation & Activity
 - Where are the communities in which you belong?
 - How are you impacting others?
 - How are you growing? What are you learning about yourself?

6. Direction
 - What is the choice ahead of you now?
 - What are the expectations that are put upon you?
 - What direction would be the most authentic expression of you?

Future: Where am I going?

7. Challenge
 - What is a challenge in your next stage that you would like to tackle?
 - How would you use your strengths and skills to overcome the challenge?
 - In what way do you wish to grow and develop?

8. Vision
 - How do you ultimately define success for yourself?
 - What kind of person will you become?
 - What kind of impact will you have on others?

9. The Next Step
 - What can you do to get started?
 - What is the next immediate milestone?
 - What will happen if you don't take action?

FORMAL ASSESSMENTS

Formal assessments can be useful in developing your understanding of your strengths and opportunities for growth, and informing individual development plans. There are a large number of assessments available, which are useful in different ways. Most formal assessments are administered and debriefed by a trained facilitator; UCAN has access to facilitators for all of the listed assessments. There is generally a fee (<\$500) associated with assessments. Department Chairs are often willing to support such assessments, so don't default to using professional development or personal funds.

Formal assessments can be timed for before you start a coaching engagement, to inform the focus and plans. They can also be delayed until after you work with the coach, when you may have a better idea of what kind of an assessment would facilitate success with your plans.

1. Feedback

360 Assessments: provide feedback from a broad range of colleagues: your boss, peers, those above you in the hierarchy, and those who report to you or over whom you have some authority. They are useful in assessing your strengths, identifying blind spots, and informing what skills and experiences will help prepare you for the next step.

2. Understanding Yourself Better

Myers Briggs Personality Type Indicator (MBTI) assessment: A self-report questionnaire that explains basic patterns in how people take in information and make decisions, MBTI is a useful tool for understanding normal, healthy personality differences, which facilitates self-understanding as well as building skills in appreciating and connecting with those who have different preferences.

TKI Conflict Mode Instrument: A self-report questionnaire that describes your preferred behavior in conflict situations and provides opportunities for expanding your repertoire and matching conflict style with situation.

