



Coach Adult Learners

Unit 7114 (v2)

Level 5

Credit 8

Assessment Pack

Name: _____

Address: _____

Phone Number: _____

For UpSkill Assessor use only

Unit Achieved: _____ **Date:** _____

Assessment Pack

Welcome to the Assessment Pack for 'Coach Adult Learners'.

People credited with Unit 7114 are able to:

- a) Prepare to coach adult learners.
- b) Conduct coaching sessions for adults.
- c) Review coaching.

Full instructions for the assessment, as well as the criteria on which you will be assessed, are included in the task instructions.

Resources

You will need:

- A learner and an observer for each coaching session.
- To complete the required forms for each session.

Conditions of Assessment

Sufficiency for this unit standard is coaching of an individual or group for **at least three different sessions, each of at least 30 minutes of coaching time per session**.

You are encouraged to use the same learner for all three sessions and a developmental coaching programme rather than three unrelated sessions. This will ensure that you understand “*coaching*” as opposed to “*teaching*” and will provide continuous development for the learner.

Definitions

The term *coaching* is defined as guiding the development of adult learners in skills, knowledge and attitudes.

Coaching is the continuous review process where a tutor checks in with their students to review achievement, provide feedback and support, and to set up future achievements.

Therefore Coaching is:-

- Clarifying learning expectations.
- Negotiating learning requirements.
- Providing feedback on learning achievement.
- Motivating the learner to perform.
- Correcting non-achievement.

Organisational policies and procedures refer to any provider, client organisation or standards setting body's documentation or reporting requirements.

Stakeholders include the learner and may include a supervisor or a management group.

Assessment Tasks

Assessment Task One requires you to:

a) Prepare to coach adult learners.

- i. Determine the current level of learner competency, expected outcomes and intended coaching time frames (PC 1.1).
- ii. Agree on expected outcomes (PC 1.2).
- iii. Negotiate a coaching schedule to meet agreed outcomes (PC 1.3).
- iv. Establish and document review criteria in accordance with organisation policies and procedures (PC1.4). *(Review criteria outlines the process the coach and learner will follow should concerns or opportunities for improvement be identified).*
- v. Have the Observer Coaching Checklist completed.

AND

b) Conduct coaching sessions for adults by ensuring:

- i. Your coaching practice includes the use of observation, receiving and giving feedback, motivating the learner, analysing performance and using time effectively during the coaching session (PC 2.1).
- ii. Your coaching methods are tailored to meet individual needs, develop individual potential, and achieve the agreed outcomes (PC 2.2).
- iii. Your learner's progress is documented, monitored, and refinements to the coaching schedule are made (PC 2.3).
- iv. You have the Observer Coaching Checklist completed.
- v. You have the Learner Attestation completed.

Assessment Task Two requires you to:

a) Summarise and self-review your coaching

- i. Complete a summary of your coaching experience by completing pages 18-20. (This provides further evidence for PC 2.1 – 2.3).
- ii. Complete a self-review of your coaching practice on page 21.
To do this, obtain feedback from the learner (and any other relevant people) on the progress and achievement of the coaching outcomes (PC 3.1). Analyse the feedback against your review criteria (refer back to Question 4 in your Coaching Preparation form in Assessment Task 1).
Identify and record areas for improvement (PC 3.2).
- iii. Attach any additional documentation that will assist you to achieve this unit standard.

What Do I Do Now?

Prepare for your coaching sessions.

Conduct your coaching sessions to meet the requirements of Assessment Task 1.

Complete the Coaching Preparation form for each session.

Please enclose a copy of your coaching records for each coaching session.

Have an approved Observer complete the Observer Coaching Checklists.

Your observer will have already completed this unit standard or be able to demonstrate equivalent experience.

Have your learner complete the Learner Attestation forms.

The attestation must relate to their current performance.

At the conclusion of your final coaching session ensure that you complete the Coaching Summary covering all three sessions (pages 18-20).

When you have finished all three coaching sessions review your coaching performance (page 21).

Attach any further documentation that may assist your assessment.

If you have any questions contact the UpSkill Assessor 0800 877 545 extn 727.

Assemble your portfolio and send to:-

**NCAET Assessor
UpSkill NZ Ltd,
PO Box 3116,
Onekawa,
Napier**

Assessment Task One

First Coaching Session

DATE: _____

TIME: _____

LEARNER NAME: _____

LEARNER SIGNATURE: _____

COACH SIGNATURE: _____

Coaching Preparation

Learner Name: _____

Coach Name: _____

Organisation: _____

1) How did you determine the current level of competency? (PC 1.1)

2) What are the expected outcomes of this coaching session? (PC 1.1)

3) What is the intended time frame for this coaching session? (PC 1.1)

4) What review procedures did you put in place, and how was it documented to meet the organisation's requirements? (PC 1.4)

Observer Coaching Checklist

Coach being observed: _____

Name of Observer: _____

Observer's contact telephone: _____

Please tick

Yes	No	PLANNING THE COACHING SESSION
		Specific coaching needs were identified PC 1.1
		Outcomes are agreed between the Coach and relevant personnel PC 1.2
		Coaching schedule is negotiated to meet agreed outcomes PC 1.3 <i>Range: timeframes, venue(s), resources, planned stages of development</i>
		Review criteria are established and documented in accordance with the organisations policies and procedures PC 1.4
Yes	No	CONDUCTING COACHING SESSIONS FOR ADULTS
		Coaching practices include evidence of use of observation, receiving and giving feedback, motivating the learner, analysing performance and the using time effectively during the coaching session PC 2.1
		Coaching methods are tailored to meet individual's needs, develop individual potential, and achieve the agreed outcomes PC 2.2
		Learner(s) progress is documented, monitored, and refinements to the coaching schedule are made PC 2.3
Yes	No	REVIEW COACHING
		Obtains feedback from the learner(s) (and any other relevant people) on the process and achievement of the coaching outcomes. PC 3.1
		I confirm that the Coach conducted the 3 x 30 minute coaching sessions

As the observer, I agree that I meet one of the following requirements (Tick one):

- I am a registered accredited assessor for Adult Education and Training Level 5 unit standards.*
- I have been accredited unit 7114 myself.*
- I hold an equivalent qualification, or can demonstrate equivalent experience. Please state qualification.*

I am aware that I may be contacted in relation to my observation of the candidate.

Observer's Signature _____ Date _____ Ph No. _____

Learner Attestation

I _____ verify that I attended a coaching session, delivered by _____ on the following date _____

I hereby state that the following took place in the coaching sessions:-

Please tick

Yes	No		PCs
		The specific coaching outcomes were confirmed by myself and relevant others (Coach and Management etc).	1.1, 1.2
		Coaching time frames, venues and resources we have negotiated will help me achieve coaching outcomes.	1.3
		The coach used a variety of methods including observation, receiving and giving feedback, motivation, analysing performance and using time effectively when coaching me.	2.1
		Coaching methods were tailored to meet my needs, to develop my potential and achieve agreed outcomes.	2.2
		The coaching session included sequenced learning activities and incorporated learning opportunities and feedback.	2.1
		My progress was monitored, documented and alterations to coaching schedule were done with my agreement.	2.3

Learner's Signature _____

Contact telephone number _____

Second Coaching Session

DATE: _____

TIME: _____

LEARNER NAME: _____

LEARNER SIGNATURE: _____

COACH SIGNATURE: _____

Coaching Preparation

Learner Name: _____

Coach Name: _____

Organisation: _____

1) How did you determine the current level of competency? (PC 1.1)

2) What are the expected outcomes of this coaching session? (PC 1.1)

3) What is the intended time frame for this coaching session? (PC 1.1)

4) What review procedures did you put in place, and how was it documented to meet the organisation's requirements? (PC 1.4)

Observer Coaching Checklist

Coach being observed: _____

Name of Observer: _____

Observer's contact telephone: _____

Please tick

Yes	No	PLANNING THE COACHING SESSION
		Specific coaching needs were identified PC 1.1
		Outcomes are agreed between the Coach and relevant personnel PC 1.2
		Coaching schedule is negotiated to meet agreed outcomes PC 1.3 <i>Range: timeframes, venue(s), resources, planned stages of development</i>
		Review criteria are established and documented in accordance with the organisations policies and procedures PC 1.4
Yes	No	CONDUCTING COACHING SESSIONS FOR ADULTS
		Coaching practices include evidence of use of observation, receiving and giving feedback, motivating the learner, analysing performance and the using time effectively during the coaching session PC 2.1
		Coaching methods are tailored to meet individual's needs, develop individual potential, and achieve the agreed outcomes PC 2.2
		Learner(s) progress is documented, monitored, and refinements to the coaching schedule are made PC 2.3
Yes	No	REVIEW COACHING
		Obtains feedback from the learner(s) (and any other relevant people) on the process and achievement of the coaching outcomes. PC 3.1
		I confirm that the Coach conducted the 3 x 30 minute coaching sessions

As the observer, I agree that I meet one of the following requirements (Tick one):

- I am a registered accredited assessor for Adult Education and Training Level 5 unit standards.
- I have been accredited unit 7114 myself.
- I hold an equivalent qualification, or can demonstrate equivalent experience. Please state qualification.

I am aware that I may be contacted in relation to my observation of the candidate.

Observer's Signature _____ Date _____ Ph No. _____

Learner Attestation

I _____ verify that I attended a coaching session, delivered by _____ on the following date _____

I hereby state that the following took place in the coaching sessions:-

Please tick

Yes	No		PCs
		The specific coaching outcomes were confirmed by myself and relevant others (Coach and Management etc).	1.1, 1.2
		Coaching time frames, venues and resources we have negotiated will help me achieve coaching outcomes.	1.3
		The coach used a variety of methods including observation, receiving and giving feedback, motivation, analysing performance and using time effectively when coaching me.	2.1
		Coaching methods were tailored to meet my needs, to develop my potential and achieve agreed outcomes.	2.2
		The coaching session included sequenced learning activities and incorporated learning opportunities and feedback.	2.1
		My progress was monitored, documented and alterations to coaching schedule were done with my agreement.	2.3

Learner's Signature _____

Contact telephone number _____

Third Coaching Session

DATE: _____

TIME: _____

LEARNER NAME: _____

LEARNER SIGNATURE: _____

COACH SIGNATURE: _____

Coaching Preparation

Learner Name: _____

Coach Name: _____

Organisation: _____

1) How did you determine the current level of competency? (PC 1.1)

2) What are the expected outcomes of this coaching session? (PC 1.1)

3) What is the intended time frame for this coaching session? (PC 1.1)

4) What review procedures did you put in place, and how was it documented to meet the organisation's requirements? (PC 1.4)

Observer Coaching Checklist

Coach being observed: _____

Name of Observer: _____

Observer's contact telephone: _____

Please tick

Yes	No	PLANNING THE COACHING SESSION
		Specific coaching needs were identified PC 1.1
		Outcomes are agreed between the Coach and relevant personnel PC 1.2
		Coaching schedule is negotiated to meet agreed outcomes PC 1.3 <i>Range: timeframes, venue(s), resources, planned stages of development</i>
		Review criteria are established and documented in accordance with the organisations policies and procedures PC 1.4
Yes	No	CONDUCTING COACHING SESSIONS FOR ADULTS
		Coaching practices include evidence of use of observation, receiving and giving feedback, motivating the learner, analysing performance and the using time effectively during the coaching session PC 2.1
		Coaching methods are tailored to meet individual's needs, develop individual potential, and achieve the agreed outcomes PC 2.2
		Learner(s) progress is documented, monitored, and refinements to the coaching schedule are made PC 2.3
Yes	No	REVIEW COACHING
		Obtains feedback from the learner(s) (and any other relevant people) on the process and achievement of the coaching outcomes. PC 3.1
		I confirm that the Coach conducted the 3 x 30 minute coaching sessions

As the observer, I agree that I meet one of the following requirements (Tick one):

- I am a registered accredited assessor for Adult Education and Training Level 5 unit standards.*
- I have been accredited unit 7114 myself.*
- I hold an equivalent qualification, or can demonstrate equivalent experience. Please state qualification.*

I am aware that I may be contacted in relation to my observation of the candidate.

Observer's Signature _____ Date _____ Ph No. _____

Learner Attestation

I _____ verify that I attended a coaching session, delivered by _____ on the following date _____

I hereby state that the following took place in the coaching sessions:-

Please tick

Yes	No		PCs
		The specific coaching outcomes were confirmed by myself and relevant others (Coach and Management etc).	1.1, 1.2
		Coaching time frames, venues and resources we have negotiated will help me achieve coaching outcomes.	1.3
		The coach used a variety of methods including observation, receiving and giving feedback, motivation, analysing performance and using time effectively when coaching me.	2.1
		Coaching methods were tailored to meet my needs, to develop my potential and achieve agreed outcomes.	2.2
		The coaching session included sequenced learning activities and incorporated learning opportunities and feedback.	2.1
		My progress was monitored, documented and alterations to coaching schedule were done with my agreement.	2.3

Learner's Signature _____

Contact telephone number _____

Assessment Task Two

Assessment Task Two requires you to:

a) Summarise and self-review your coaching.

- i. Complete a summary of your coaching experience by completing pages 18-20. (This provides further evidence for PC 2.1 – 2.3).
- ii. Complete a self-review of your coaching practice on pages 21-22. To do this, obtain feedback from the learner (and any other relevant people) on the progress and achievement of the coaching outcomes (PC 3.1). Analyse the feedback against your review criteria (refer back to Question 4 in your Coaching Preparation form in Assessment Task 1).
Identify and record areas for improvement (PC 3.2).
- iii. Attach any additional documentation that will assist you to achieve this unit standard.

DELIVERY OF ADULT EDUCATION AND TRAINING

Coach Adult Learners (V2)

Level:	5
Credit:	8
Final date for comment:	December 2006
Expiry date:	December 2007
Sub-field:	Adult Education and Training
Purpose:	People credited with this unit standard are able to prepare, conduct coaching sessions, and review coaching of adult learners.
Entry information:	Open.
Accreditation option:	Evaluation of documentation and visit by NZQA and industry.
Moderation option:	A centrally established and directed national moderation system has been set up by NZQA.
Special notes:	<ol style="list-style-type: none">1 Definitions <i>coaching</i> for the purposes of this unit standard is guiding the development of adult learners in skills, knowledge and attitudes; <i>organisation policies and procedures</i> refer to any provider, client organisation or standards setting body's documentation or reporting requirements.2 For a unit standard on the design of learning sessions refer to Unit 7093, <i>Design learning sessions for adult education and training</i>; for the assessment of learning refer to Unit 4098, <i>Use standards to assess candidate performance</i>.3 Delivery and assessment of adult training is subject to compliance with the Health and Safety in Employment Act 1992, and organisation policies and practices.4 Sufficiency for this unit standard is coaching of an individual or group incorporating at least three different sessions, each of at least 30 minutes of coaching time per session.

Elements and Performance Criteria

Element 1

Prepare for coaching adult learners.

Performance criteria

- 1.1 Current level of learner competency, expected outcomes, and intended coaching timeframes are determined.
- 1.2 Outcomes are agreed between coach and stakeholders.
Range: stakeholders include the learner and may include - supervisor, management.
- 1.3 Coaching schedule is negotiated to meet agreed outcomes.
Range: timeframes, venue(s), planned stages of development, resources.
- 1.4 Review criteria are established and documented in accordance with organisation policies and procedures.

Element 2

Conduct coaching sessions for adults.

Performance criteria

- 2.1 Coaching practice includes evidence of use of observation, eliciting and giving feedback, motivation, analysis, and time management.
- 2.2 Coaching methods are tailored to meet individual needs, develop individual potential, and to achieve agreed outcomes.
- 2.3 Progress is documented, monitored, and refinements to schedule agreed between coach and learners.

Element 3

Review coaching.

Performance criteria

- 3.1 Stakeholder feedback on process and achievement of outcomes is sought and analysed against review criteria.
- 3.2 Self-review includes identification of possible areas for future refinement.