

PSD2 and PSA Scoring Rubric

COACHING BEHAVIOR DEMONSTRATION EVALUATION: PSD2/PSA

Adapted from NBHWC Practical Skills Guidelines

STUDENT NAME: _____ Date: _____

EVALUATOR/MC NAME: _____

Required: Complete session (start to finish) Video is gallery view Video < 30:00min.

FOR PSA ONLY: Overall Result: Skills Competent or Skills Still Developing

- Please note: The competencies are listed in the leftmost column, with a description of the essence in bold italics below each. The evaluator is looking for predominant evidence that the coach demonstrates the spirit/essence of each competency.
- The next two columns include an *abbreviated list of examples* of behaviors that could demonstrate the competency and a *short list of examples* of behaviors that demonstrate a lack of the competency, respectively. There are almost infinite ways and behaviors that could demonstrate the individual competencies. The examples below are *not* checklists, but rather are examples only, for further clarification.
- As you review your session, 1) assess what the preponderance of evidence demonstrates and 2) assess if, and how, you have demonstrated - *in this session* - competency in this core coaching skill.
 - Demonstration of one or more non-coaching behavior does not indicate an automatic non-pass; assessors are looking for evidence that on balance, coach uses coaching behaviors, meeting the essence of the competency.
 - Similarly, demonstration of simply one of the coach-consistent behaviors does not indicate an automatic pass.

PSA PART ONE

Did the coach successfully demonstrate the following?

Should a student receive a “no” on any one of the following elements, it is an **automatic** NYC (not yet competent)

Critical Elements – You MUST receive ALL yes/true scores on these 5 elements.	Yes/True or No/False?
1. Do no harm. There were NO potentially harmful consequences of the coaching session.	
2. The coach recognized and addressed potential client concerns, imminent dangers, and/or medical red flags, and referred to another health care professional when/if appropriate.	
3. Practices within the defined Professional Health Coach Scope of Practice.	
4. Maintains Professional Code of Conduct, Code of Ethics, and respects professional boundaries.	
5. Maintains privacy and confidentiality of client. There are no apparent potential or real conflicts of interest.	



NBHWC Guideline	Examples of Coaching Behaviors	Examples of Non-Coaching Behaviors	Coaching Behavior Observed Y or N	Comments & Why Quotes/examples
<p>A. Be calm, present, and emotionally available</p> <p><i>Coach creates conditions for the coach and client to do their best work together.</i></p>	<ol style="list-style-type: none"> 1. Presents as calm throughout the beginning of a session. 2. Takes time to be physically in place and ready; has professional space for coaching. 3. Coach takes time to pause and hear what was just said without rushing to respond. 4. Eye contact maintained if on video or in-person (cultural caveat). 	<ol style="list-style-type: none"> 1. Presents as nervous or agitated at any time during session. 2. Distracted or interrupted or fails to address digital or other interference, such as notifications or phone calls. 3. Frequently jumps in immediately after client statements. 4. Excessive note taking so not present to client. 		
<p>B. Show empathy</p> <p><i>Coach seeks to communicate respectful understanding and appreciation of the client's experience, including feelings, needs, and desires.</i></p>	<ol style="list-style-type: none"> 1. Reflects and acknowledges client's feelings and/or emotional state with empathetic, nonjudgmental, supportive comments. 2. Uses silence and pauses to stay attuned to client's emotional state. 3. Coach recognizes opportunities to affirm or acknowledge the client. 	<ol style="list-style-type: none"> 1. Does not acknowledge client's emotions or state. 2. Responses are out of sync with client's emotional state. (e.g. client says they are coming into the session stressed. Coach says, "good" and moves on.) 3. Does not allow pauses or silence when called for. 4. Coach puts "positive" spin/ interpretation on client's emotions. 5. Coach is just focused on getting actions and goals completed, not attuned to the client's feelings, concerns. 6. Excessive utterances such as mmm-hmmm, ok, yes, etc. 		



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<p>C. Establish rapport</p> <p><i>Coach holds client as naturally creative, resourceful and whole. Coach engages client throughout the session with curiosity and nonjudgment validating the client's point of view and experience.</i></p>	<ol style="list-style-type: none"> 1. Uses reflective statements to demonstrate understanding. 2. Responses reflect curiosity and nonjudgmental manner (e.g., uses “why” questions appropriately). 3. Appears to modulate emotions appropriately. 4. Validates client’s experience with comments that show respect and unconditional positive regard. 5. Coach uses complex reflections capturing the essence or desire of the client. 6. Coach recognizes connections or shifts across previous coaching sessions. 	<ol style="list-style-type: none"> 1. Comments do not reflect or follow client’s agenda. 2. Makes light of broken coaching agreements (i.e. missed appointments). 3. Does not acknowledge client confusion or lack of connection. 4. Coach does not re-engage when client has dis-engaged from conversation. 5. Coach treats client relationship like a friendship sharing stories and bantering back and forth. 6. Rescues the client whenever client is uncomfortable or struggling. 		
<p>D. Ensure client’s agenda, needs, interests and preferences drive the coaching</p> <p><i>Coach maintains a client-centered process that facilitates and empowers the client to set and achieve self-determined goals.</i></p>	<ol style="list-style-type: none"> 1. Evokes from client more details that support client’s self-discovery. 2. Coach checks in with the client if they are ready to explore, plan, strategize, close. 3. Coach clarifies and holds client agenda; if multiple potential paths arise, coach checks in with client to confirm direction. 4. Coach addresses red flag or other client concerns even if not client’s explicit focus for the session. 5. Coach is mindful of and honors time commitment/ time management established with the client. 6. Coach builds in an intentional pause prior to planning, checking in with client as to how they’d like to proceed. 	<ol style="list-style-type: none"> 1. Tells client what to do/gives advice. 2. Comments don’t address or explore client’s stated needs, preferences and interests. 3. Comments reflect coach’s own view of agenda or situation. 4. Interrupts client’s decision-making process. 5. Coach directs (doesn’t ask) to move to a different part of the session (i.e. planning, setting focus). For example: <i>“I want to go to planning now.”</i> 6. Coach asks leading questions/leads client to problem solving according to coach’s view of the issue or path to solution. 7. Coach uses approval language or cheerleads vs. affirming or evoking client thoughts and opinions. 		



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<p>E. Invite client to select focus of session</p> <p><i>Coach evokes a clear agreed upon focus from the client. Coach takes the time necessary to clarify and narrow the focus with the client.</i></p>	<ol style="list-style-type: none"> Invites the client to choose area of focus for the session. Elicits from client desired state related to area of focus. (i.e. what is important about this, what is underlying desire). Establishes and maintains client agenda. If client shifts topic, coach acknowledges this and elicits client's choice. 	<ol style="list-style-type: none"> Does not ask the client to choose focus or tells or directs client toward focus. Does not elicit clarity from a broad topic. Does not clarify the client's agenda for the session (i.e. what the client wants to achieve in the session). Fails to acknowledge shift in client's dialog or does not explore their intent. 		
<p>F. Explore the client's vision of optimal health and well-being</p> <p><i>Coach engages the client in a deeper understanding of their vision and how the session's focus and learning relates to that vision. This helps to tie the client's individual session to the overall arc of coaching and desire for the client.</i></p>	<ol style="list-style-type: none"> Ask questions that assess client's readiness to explore a health and well-being vision. Co-creates with clients a vision that honors their preferences, values, goals. Elicits the client's insights about vision of optimal health. Invites clients to summarize the vision and talk about the meaning it holds. Uses mind-body techniques (e.g., relaxation, imagery) to help client access an internal process. Coach skillfully and seamlessly refers to client's wellness vision during the session, helping the client tap into inspiration in service of the session goal. 	<ol style="list-style-type: none"> Does not refer to or ask about client's vision of optimal health and well-being. Coach only addresses the topic of week, thereby missing the value of design. i.e. coach does not attempt to tie a set of needs to a broader, deeper vision that could serve as a powerful force for the client. Client mentions their vision. Coach moves on without addressing the vision. 		



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<p>G. Establish long-term goal(s) to be enacted by 3-6 months or by end of coaching agreement</p> <p><i>Coach engages the client in a deeper understanding of their long-term goals and how the session's focus and learning relates to one or more of the client's long-term goals. This helps to tie the client's individual session to the overall arc of coaching and desire for the client.</i></p>	<ol style="list-style-type: none"> Partner with client to plan long-term goal(s) that are specific, concrete, actionable, and realistic. [SMART] Facilitates goal-setting that ties client-identified larger vision and values to long-term goal(s). Invites client to consider how lessons learned from prior experience can be applied toward the long-term goal(s). Coach skillfully and seamlessly refers to long-term goal(s) during the session. Coach clarifies long-term goal connected to session focus.(e.g. "If this were to become a sustainable new practice, what would it look like in say 3 months?") 	<ol style="list-style-type: none"> Coach does not refer to or ask the client about the long-term goal(s). Suggests long-term goals in directive manner. Does not inquire or help client define what success looks like. Edits long-term goal(s) presented by the client. Substitutes their expertise for the client's in setting goals. Confuses client's vision with long-term goal. For example, coach refers to "your long term goal of being at peace," but does not clarify what is a related goal whereby the client could measure/know they have attained. 		
<p>H. Establish or refine client's short-term SMART goals or action steps for what will be accomplished between sessions</p> <p><i>Coach partners with client to establish client's plan to accomplish between sessions; these short-term goals should be SMART - client is clear about what they are doing and has a reasonable expectation of success.</i></p>	<ol style="list-style-type: none"> Facilitates the client identifying client's short-term goals or action steps. Partners with the client to create SMART goals or action steps that fit the client's learning style and pace. Seeks commitment and accountability regarding client's agreed- upon "homework" between sessions. Approaches goal setting with an "experiment" mindset. Invites client to consider how lessons learned from prior attempts can be applied toward the next action step or short-term goal. 	<ol style="list-style-type: none"> Does not partner with client to plan action steps or short-term goals. Suggests action steps or short-term goals in directive manner. Does not encourage client to break down large, complex goals into smaller action steps. Does not clear up confusion around action steps or goals with clarifying questions when client expresses uncertainty. Edits plans or goals presented by client. Substitutes own expertise for client's in setting goals. 		



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<p>I. Actively Listen</p> <p><i>Coach listens deeply to what the client is saying as well as to the possible meaning behind the words. Coach practices presence and reflects client's statements / meaning by strategically "holding a mirror" for the client to hear their own words and intent, with emphasis on client's desires, values and strengths.</i></p>	<ol style="list-style-type: none"> 1. Demonstrates active listening by remaining focused on, attuned to, and responsive to what the client says. 2. Maintains eye contact, remains quiet, and acknowledges listening with body language. 3. Comments reflect an awareness of client's topics or content, including emotion, energy, or shifts. 4. Reflections indicate that coach listens at deeper levels to underlying concerns and unspoken issues. 5. Skillfully interrupts repetitive stories from client to keep the conversation forward moving. 6. Coach reflects client's desire for change. 	<ol style="list-style-type: none"> 1. Does more talking than client. 2. Comments demonstrate that coach fails to listen to client, overrides their comments, or consistently misses content and intentions. 3. Comments and behavior reveal coach is not attentive to client's speech, content, tone, gestures, posture, and other non-verbal behavior. 4. Interrupts client in ways that do not serve the client. 5. Coach makes statements/ asks questions that indicate coach agenda, leading client rather than listening/following and creating learning/forward movement. 		
<p>J. Ask Open-ended Questions</p> <p><i>Coach asks single, powerful, succinct questions that evoke the client's stories, feelings and deeper reflections. Coach's questions begin with "what" and "how."</i></p>	<ol style="list-style-type: none"> 1. Asks primarily "what" and "how" questions. "Why" questions, when used, are strategic, respectful, and judiciously used with the right tone and intention. 2. Asks questions that reflect sincere curiosity in service of the client that evoke client's beliefs, attitudes, values, and intentions. 3. Asks clear, direct open-ended questions to evoke client's stories, images and feelings to access a deeper level of reflection. 4. Questions are succinct and asked one at a time. 	<ol style="list-style-type: none"> 1. Frequency of closed questions limits process of evoking deeper reflection and elaboration. 2. Asks leading questions (e.g. toward what coach thinks is the best solution). 3. Pushes a line of inquiry that the client continues to dismiss or not accept. 4. Asks questions that reveal coach's hidden biases, including that the client is not the expert in their life. 5. Questions are stacked, multiple choice, qualified, or embedded in excessive verbiage. 		



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<p>K. Help client explore and articulate values, sense of meaning and purpose</p> <p><i>Coach evokes to bring the client to clarity around what is important to them, what they value and their “why.”</i></p>	<ol style="list-style-type: none"> 1. Asks questions and offers reflections that support client’s self-discovery of values, meaning and purpose. 2. Offers reflective statements or open inquiries that tie client’s values to client-directed goals and desired outcomes. 3. Offers curious inquiry about discrepancies between what client says, their values and beliefs and their actions without judgment or blame or evoking defensiveness or resistance. 4. Elicits from clients how the focus for the conversation is important to them. 	<ol style="list-style-type: none"> 1. Tells client what their values are and sidesteps process of self-discovery for the client. 2. Does not ask about the client’s values or beliefs. 3. Does not ask about meaning or purpose of client’s intended pursuits. 		
<p>L. Anticipate, plan for, and help client navigate challenges</p> <p><i>Coach evokes from client potential challenges or obstacles to accomplishing their action steps and evokes from the client how they can meet the challenges, building an environment of potential success.</i></p>	<ol style="list-style-type: none"> 1. Invites client to forecast challenges and barriers, as well as plans to overcome them. 2. Partners with client to co-create plan to navigate challenges with identified steps and timeline. 3. Explore ambivalence and competing commitments. 4. Brainstorms potential solutions as appropriate. 	<ol style="list-style-type: none"> 1. Tells the client what challenges will be or gives client a plan for action to navigate challenges. 2. Does not bring up topic of potential barriers or challenges with client’s action plan. 3. Downplays or does not address client’s indications of hesitancy or lack of readiness or confidence to pursue plan. 4. Tells client how to “fix” problem. 5. Does not brainstorm when client appears stuck. 		



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<p>M. Explore broader perspectives and inspire interest in new possibilities</p> <p><i>Coach evokes from client an awareness of what is possible and helps the client to move from a potentially limiting mindset to a broader, more open perspective.</i></p>	<ol style="list-style-type: none"> Helps the client integrate new awareness by engaging the client in problem solving. Offers different visual tools or cognitive exercises (e.g. body scan, decisional balance, visualization, brainstorming, mindfulness techniques) to create generative moments or opportunities for insight. Invites client to take a sky-high, future self, or other meta view and expand awareness beyond the immediate goal or situation to a broader perspective. 	<ol style="list-style-type: none"> Does not explore different perspectives, or expand choices, options and pathways. 		
<p>N. Share information</p> <p><i>Coach shares information, when appropriate and within scope of practice, asking permission prior to sharing and preserving the client's autonomy when sharing (EPE).</i></p> <p><i>Coach should not ignore clients requests or needs for information, but does not need to offer any otherwise.</i></p>	<ol style="list-style-type: none"> Asks client what they already know, or what they may have heard related to the particular topic of discussion. Asks permission when sharing information or recommendations, or provides information when specifically asked to do so. Coach checks in with client after brief information is shared to better understand what the client heard, how it fits with them, and what they make of the information. Stays within scope of practice when information sharing. Coach skillfully preserves the client's autonomy, self-efficacy and resources when helping them gain knowledge and skills. [Elicit-Provide-Elicit]. Coach checks in about information shared in a previous session. 	<ol style="list-style-type: none"> Provides information, gives advice and makes recommendations, without permission or prompt from client. Coach overshares (e.g. personal in nature, excessive, more educating than coaching). Coach does not wait for client to grant permission before sharing. Coach shares information that is not evidence-based (i.e. speculative, opinion, potentially harmful). Coach shares ideas or suggestions that are prescriptive in nature (i.e. telling the client what they should do - even if they have gotten permission first.) Ignores client request for information. 		



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<p>O. Discuss and honor client’s preferences for self-monitoring</p> <p><i>Coach supports client in identifying ways of knowing if/ how plan steps are working for them; this may include means for self-tracking/self-monitoring, and accountability structures to bolster client self-awareness and success toward goal.</i></p>	<ol style="list-style-type: none"> 1. Asks clients what would be helpful to stay accountable to themselves. 2. Support clients in selecting specific accountability methods. 3. Asks clients how they would like to track (self-monitor) their desired behavioral actions. 4. Asks clients how they will assess the effectiveness of their actions/experiment. 	<ol style="list-style-type: none"> 1. Fails to mention tracking or self-monitoring after action planning or goal-setting conversation. 2. Suggests forms of accountability that sound parental in nature, or do not connect to client’s stated agenda and desired outcomes. 3. Coach holds client accountable to coach (e.g. “How will I know you’ve been successful?”) 		
<p>P. Facilitate process of self-discovery, learning and insight</p> <p><i>Coach elicits the client's growth, awareness, self-discovery, and insight and facilitates bringing that learning forward from one challenge to the next.</i></p>	<ol style="list-style-type: none"> 1. Invites client to reflect and gather insights about what was learned in prior attempts, and apply that learning going forward. 2. Positively reframes setbacks as learning opportunities. 3. Offers decisional balance work (explores pros and cons), if needed, and/or scenario planning (i.e., what if the client chose this path vs. another path, etc.) 4. Invites client to share “take-aways” at the end of the session. 5. Evokes client insight or encourages reflection. 6. Asks how the client intends to celebrate accomplishments. 	<ol style="list-style-type: none"> 1. Provides the solution, knowledge or insight without exploring client’s awareness of the subject. 2. Does not invite client to share their own answers, learnings, insights and solutions. 3. Summarizes what client’s take-aways should be, rather than evoking from client. 		



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<p>Q. Prompt for, and amplify positive resources (including past successes, qualities, strengths, and skills)</p> <p><i>Coach fosters client self-efficacy through evoking strengths, past experience, skills, passions, and other internal resources.</i></p>	<ol style="list-style-type: none"> 1. Facilitates client's identification of strengths and supports how those strengths can be used. 2. Affirms and acknowledges successes to date. 3. Asks about or acknowledges client's strengths, qualities, effort or skills. 	<ol style="list-style-type: none"> 1. Does not ask about positive resources. 2. Does not ask client to consider identified strengths, qualities or skills. 3. Fails to acknowledge client's strengths, qualities, effort or skill. 		

PSD2/PSA PART TWO

The following elements are all **important** considerations for a professional coach. However, there is NOT a requirement to receive all yes/true scores.

Professional Coach Considerations - Important considerations but you do NOT need to receive all yes/true scores.	Yes/True or No/False?
1. Effectively managed time, appropriately redirects client and conversation if/when necessary.	
2. Recording was clear, audible, and understandable. Coach was visible.	
3. Professionally closed the session with the client.	

ADAPT Model of Coaching – Framework	Y	N
1. Engaging & opening the conversation		
2. Agenda–setting focus		
3. Evoking		
4. Pausing before planning		
5. Planning movement / support structure		
6. Closing the session		

PSD2/PSA PART THREE

What are two things that went well during the coaching session? What strengths did the student demonstrate?

1.

2.

What are two things that you would encourage the student to work on to continue to deepen their coaching conversations?

1.

2.