Coaching

Terms of engagement

This form outlines the Terms of Engagement for the Heart of the City CSR Coaching service. It serves as guidance for both Contributor and Newcomer and eligible Alumni member businesses.

The services matches a Contributor with a Newcomer or Alumni member business for a long term (approximately one year) coaching relationship. In this role, the Contributor ‘Coach’ acts as a sounding board and guide for a Newcomer or eligible Alumni member business as they develop their CSR programme.

Before the meeting

The Newcomer or eligible Alumni member fills out a ‘CSR Coaching Application Form’ available in their member area on the website – the form provides an overview of their needs as well as guides the Heart of the City Project Manager to find a suitable coach.

Based on the Application Form, Heart of the City approaches a suitable coach candidate. When the coach confirms that they are able to take part, the Project Manager will then organise a three-way introductory meeting.

Introductory meeting

The Project Manager will be present for the first meeting only and will help set the agenda. The agenda is expected to cover the following:

- The Coach describes their background and experience, their business, the core values, CSR objectives and company’s resources.
- The Coachee describes their background and experience, their business, the core values, CSR objectives and company’s resources.
- The Coachee describes their current situation, what motivated them to use coaching, and what issues they would like to address.
- The Coach describes their approach to coaching and their experience in the context of the Coachee’s needs.
- The structure of the relationship is discussed:
  - Duration of meetings. An hour is the suggested minimum duration.
  - Date of the meetings. The date of the next meeting should always be set at the current meeting to ensure continuity.
  - Frequency of the meetings. We suggest a minimum of one meeting a quarter, however, the frequency of meetings may vary according to the needs.
  - Term of the coaching relation. The relationship is expected to last one year.
  - Method of communication. What method of communication is preferred in between meetings.
  - Additional support. Any additional support that the Coach is prepared to offer between meetings, such as phone or email conversations.
  - Responsibilities for meeting notes, agenda, setting up meetings.
  - Preparation for meeting. We suggest that the Coachee use the template ‘CSR Coaching Meeting form’ in preparation of the meeting, indicating
what they have or have not accomplished since the last meeting, any new issues that have arisen and what they would like to discuss at the next meeting.

- **Close of meetings.** It is useful to conclude with the Coachee reviewing the main points covered, action items and issues that need more work (also found in the ‘CSR Coaching Meeting form’) as well as confirming the date of the next meeting.

All exchanges within the coaching relationship should be considered confidential by both parties.

**Please Note:** The first meeting allows both parties to decide whether the engagement will continue, and, if so, upon what terms. Neither party is committed to continuing the engagement until after the first meeting. The only commitment at the first meeting is mutual confidentiality.

**Meeting Timeline**

This should be used as a guideline for how a coaching relationship can look. This is by no means the only way to structure your relationship and Coach and Coachee should find a system that is relevant to their needs and resources. It is however, important that you meet regularly and at least three times in a year. You may also find that your Coach is happy to speak on the phone in place of or in addition to meeting in person.

**Week 0**
Coachee completes ‘CSR Coaching Application form’ and submits to Project Manager.

**Week 3**
Email introduction of Coach and Coachee by Heart of the City Project Manager.
Project manager to set a date for initial meeting with Coach/Coachee.

**Week 4**
Coachee to consider expectations and objectives in preparation for initial meeting, as well as initial questions or topics to discuss – let Project Manager know so this is fed into agenda.

**Week 5**
Initial meeting between Project Manager, Coach and Coachee to discuss objectives and commitment and to set terms for how the relationship will be structured. Set dates and goals for meetings for the year - we would suggest meetings are held quarterly. Raise questions and set actions for following meeting.

**Week 16**
Coachee to prepare for 2nd meeting with Coach - complete follow-up and agenda section of Coaching meetings Form. Coachee to communicate agenda to Coach before the meeting.
**Week 17**

Meeting between Coach and Coachee. Discuss recent achievements, challenges and set actions for following meeting.

Plan to meet every 12 weeks as above. It is also a good idea to have a final meeting when the coaching comes to an end (at the one year mark) in order to reflect on your achievements.

**Who arranges the meetings?**

**First meeting (meeting 1)**
The Heart of the City Project Manager will arrange the first meeting.

**6-months (meeting 2)**
The dates of future meetings should generally be set at the previous meeting. However, in the first 6-months, the Coach will be in charge of confirming the meeting date that has been set in the previous meeting.

**Second 6-month (meetings 3 & 4)**
As above, the dates of future meetings should generally be set at the meeting. However, in the second 6-months, the Coachee will be in charge of confirming the meeting date that has been set in the previous meeting.

**Feedback**

The Heart of the City team will check in with both parties on a 6-monthly basis to see how the coaching relationship is progressing and will conduct an exit interview with both parties individually after 1 year or when the mentoring relationship ends, whichever is sooner.

**Commitment of the CSR Coaching programme**

These are the terms that we expect both Coachee and Contributor business to adhere to:

- Attend a 3-way introduction meeting with your Project Manager
- Understand that both parties are participating in the CSR Coaching relationship on top of their day job - please be respectful of their time e.g. respond promptly when the other party contacts you and try to keep arrangements to meet.
- Accept that there may be some organisational differences between your business and that of your Coach/Coachee.
- Treat all information shared by your Coach/Coachee confidential and therefore be open to sharing common challenges and past mistakes.
- Let your Project Manager and your Coach/Coachee know if you are no longer able to continue the ‘CSR Coaching’ Programme.
- Let your project manager and your Coach/Coachee know if your contact details change.