

Keeping Records of on-the-job Coaching

The creation and maintenance of records relating to the coaches of an institution are essential to:

- Managing the relationship between the organisation and the coaches.
- Providing support and other services and facilities to the coaches.
- Controlling the coaches academic progress and measuring their achievement at the organisation.

The Purpose of Reports

Coaches need to obtain record and organise administrative information and fulfil the administrative requirements needed to manage on the job training of the coaches in their organisation.

Administrative work is concerned with organisational maintenance. It is the routine paperwork that keeps the system going. It is also a record of transactions and events for the organisation.

The administrative tasks include some of the following:

- Coaches personal details sheet
- Coaches contracts
- Attendance registers
- Individual development plan
- Coaching schedule
- Job profile/performance outcomes
- Coaches feedback on coaching
- Coaches progress records
- Management reports
- Copy of ID
- Coaches assessment documents
- Copy of certificates
- Copy of resume

These schedules and records should be kept simple and user friendly. It is not necessary to have complicated forms. It is, however, necessary to make sure that all your forms are filled in neatly and correctly and with all the relevant information. This will allow you to refer to information you might need quickly, as well as allow other people, who may need the information, to find it easily.

Do not leave paperwork piled-up; it must up-to-date, and it must be correct. Incorrect information is worse than no information.

You should have a file for each coach in your organisation.

This file holds all information relevant to the person's learning experience and you must, therefore, accurately record all information about needs, problems and the action taken.

Do not leave these records lying around as it is always your duty and responsibility to keep confidentiality.

Types of Records

Records are documents or other items which:

- contain recorded information;
- are produced or received in the initiation, conduct or completion of an activity;
- are retained as evidence of that activity, or because they have other informational value.

The recorded information may be in any form (e.g. text, image, sound) and the records may be in any medium or format.

Coach's records – records associated with managing the relationship between an organisation and its coaches/learners – can be organized into three broad categories, each of which may be additionally divided:

- Records documenting the contractual relationship between the coaches/learner and the organisation.
- Records documenting the coaches as a learner e.g. records documenting programmes undertaken, academic progress and performance, awards – usually stored by coach.
- Records documenting the coaches as an individual and consumer of services provided by the organisation e.g. records documenting use of accommodation services, counselling services, library and IT support service, careers, and employment services – usually stored by the HR.

Coaches / Employee Progress Records

The coach handles records of the coachee's/employee's progress.

Coach/employee progress records consist of all test results and evaluations.

Coach/employee progress records are essential. This is a means of tracking how each coach/employee is doing and are an effective way of identifying any problems the coach/employee may have so that they can be dealt with promptly.

Coach/employee records also provide valuable information to management and funders. They make the task of report writing much easier for the coach.

Without coach/employee records there is no way of proving what the coaches/employee has achieved during the learning programme.

Individual Development Plan

After your discussion with the coaches on his/her progress, the two of you will have to decide what actions you must take to address any not yet competent areas. This example may help you:

Coach Name and Surname		
Employee Number		
ID Number of Employee		
Highest Qualification Obtained		
Training Courses Attended		
Workplace Experience		
Career Expectations		
KPA's	Performance against standards discussed	On standard Above standard Below standard

Area of Development	Development Action	Start Date	Completion Date	Support Needed By
E.g. Interpersonal skills	Source a course of adapting behaviour (behavioural styles)	20 May 2010	30 June 2010	Budget approval from manager Help from training department to source course

Signature of Coach: _____

Date: _____

Signature of Employee: _____

Date: _____

Filing of Records

The nature of coaches records and the personal information they have demands that they should be stored in facilities and equipment ('hard copy' records) or electronic systems (digital records) which are secure and accessible only to authorised staff whose work needs them to have access. In addition, the facilities and equipment should provide:

- Adequate space for all the records which need to be produced and retained
- Appropriated environmental conditions for the record media used.

Storage facilities and systems should meet the same standards irrespective of where they are located and who is responsible for managing them.

The basis of a time-efficient approach to maintaining records is a good filing system. Make sure that all your paperwork is correctly filed at the end of each day.

A little time spent recording and storing information correctly will save you hours of searching.

Make sure that all your records are filed correctly and systematically, usually in alphabetic or numeric order. A 'cardex' file for information could also be used.

Not only will this allow you to refer to information you might need quickly, it will also allow other people who may need the information to find.

Authorised staff should keep a record of:

- The content, format, and location of all student records.
- The names and designations of all staff with access to coaches' records, and any limitations on that access.
- Coaches records which have been transferred to another part of the organisation, particularly after the coaching process is completed.