

## PORTFOLIO GUIDELINES FOR CCP CERTIFICATION 2014-2015

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If you are seeking to be certified, that means that you have 1) been coached through your own ITC cycle, 2) been supervised delivering an ITC coaching cycle to a “practice client” and 3) prepared a portfolio, using the Immunity-to-Change® Coach’s Tracking Book, of your coaching work with a “portfolio client.” Your coach, Barbara, David or Deb, can answer general questions about what is expected in terms of completing the final portfolio, and the actual portfolio review will be facilitated by Bob and Lisa.

For us to make an informed certification decision about your readiness to do the ITC coaching on your own, we need evidence of the kind of work you produce with your coachee, and how you reflect on your work. Given our premise that you will be a more effective ITC coach having gone through the experience yourself, we also ask that you provide us an overview of your change process.

Below is a description of what we are asking you to submit to us (between September 1-15). But first we want to convey the spirit of what we are looking for in what you write, and that may be easiest conveyed at the start by saying what we do *not* expect: we do not expect “perfect ITC coaching.” We do not expect you to be flawless, and we do not expect that your client has necessarily made earth-shattering change. On the contrary, we expect there will be many places where you would like to do something differently than you did. We are as interested in the way you think about the “messes” or stuck places you may get into, and your thoughts about how to get out of them, as we are in evidence of your ability to deliver the various components of the ITC journey.

Regarding your own personal journey, we are looking to see the extent to which you are able to draw on your personal experience as a way of deepening your understanding of what your clients may experience as they engage in the ITC process. You are all experienced coaches already, but this is the first time you, yourself, have been coached on overturning your own immunity.

Regarding your client work: here we want to see evidence that you are applying the principles of ITC coaching (especially the connection between mindset and behavior in change) and that when you are not doing so, you have caught yourself. We do not expect that you have done every step of the process with your client, or that the work has gone smoothly.

Now, on to what we are asking to you submit. Your final portfolio should include three sections: 1) your personal journey becoming an ITC coach; 2) your ITC work with your client; 3) your reflections on you coaching your client. Each section is spelled out below:

**Regarding your personal journey:** please select at least one or two of the questions here, and answer them in a page (or two, if needed): 1) what changed for/in you? How did that happen? 2) What are the biggest take-aways from your being a coachee to your being a coach? 3) In what way does your experience of being coached influence how you coach or will coach others? 4) What, if anything, do you find yourself thinking or feeling differently about as you engage your client (or

imagine engaging future clients)? Are there dimensions you find yourself paying more or less attention to compared to your usual form of coaching?

**Regarding your client work:** please use the electronic-version of the Immunity-to-Change® Coach's Tracking Book as the basis for this portion of your portfolio. It provides a very clear structure to document your work with your client (your client's work, and your thinking about that). Feel free to add documentation of your responses to your client (comments you have exchanged via email or through using the ITC Workbook, or private notes to keep track of your work with this client, summaries of phone-meetings, etc.), making clear what points you are intending these communications to illustrate.

**Reflection on you coaching your client:** please answer the following questions here in two to three pages:

- a. Pick at least one area where you felt your coaching was strong: describe what you did, and explain why you see it as strong. If there are ITC criteria that apply to that area, reference them and show how what you / your client produced meets those criteria.
- b. Pick a place where your coaching was less than optimal. Explain:
  - i. How do you think you got into that situation? (e.g., relevant assumptions? problem conditions? inadequate competencies?)
  - ii. What options do you see for getting out of that situation?
  - iii. How might you avoid getting into that spot in the future?
- c. Pick one place where you felt especially challenged or puzzled about what to do (e.g., could be a place where you saw a lot of options but didn't know how to choose; could be a place where you felt stuck and couldn't see any options etc.). Give us your current thinking about this.
- d. A critical success factor in effective ITC coaching is keeping the connection between behavior and mindset front and center stage. If you have not yet commented on this theme in your responses a – c, then please assess yourself on this: to what extent, and in what ways, do you see yourself as attending to both mindset (e.g., Big Assumptions) and behavior throughout your coaching? Provide examples.
- e. Finally, effective coaching requires the coach to be a top notch listener. Please self-assess your listening to this particular client. (It might be helpful, in answering this, to imagine how your client would answer this!). Provide examples.

You can submit your portfolio to Bob and Lisa anytime between September 1-15th. We will read your portfolio, conduct an interview with your coachee, and schedule a time to talk with you. (Please note that the time between when you send us the portfolio to our review/certification meeting can be up to several weeks, depending on how many portfolios we receive, whether your portfolio client is on vacation, etc.). At that time, we will come to a common decision as to whether you are ready to conduct this work on your own. Our hope is that everyone who wants to become certified will be able to do so, albeit at different paces.