

# Handbook on Performance Review of Coaches



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Coaching  
Association  
of Canada

**COACHES**  
of Canada

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# Handbook on Performance Review of Coaches

## Context



This handbook is a tool to assist national sport organizations (NSOs) in reviewing the performance of the national coach(es) they employ. Performance review is a challenging task. Coaching is a complex activity, one requiring many competencies on the part of the coach – this alone makes the task of performance review difficult. Add to that the fact that NSOs are, for the most part, absent while the national coach is working. Further, success in coaching is dependent upon a variety of other factors, many of them beyond the direct control of the coach. When it comes time to review performance, it is not surprising that many employers wonder where to begin. This handbook offers an easy-to-implement, step-by-step approach, including tools and templates.

This handbook is primarily directed to performance reviews of national coaches. While much of it is applicable at other levels of coaching, it would be important to adapt the tools to fit the specific coaching situation.

## Background

Employers take a wide variety of approaches to the evaluation of coaches. As in many other work environments, performance review is a challenge for both the evaluator and the person being evaluated. There is sufficient anecdotal evidence that, outside of educational institutes, performance evaluation of coaches has been characterized by many of the problems that the literature identifies.

- Who does the review, as well as when and how it is done, often changes from one evaluation to the next.
- Those who are doing the evaluation, or those asked to provide input, often lack experience in evaluation.
- The purpose of the evaluation is not clear.
- The ‘supervisor’ is often not present when the ‘work’ is being done and doesn’t have first-hand information; that is, the high performance director is not with the coach on a day-to-day basis.
- Often the criteria are subjective and difficult to measure because coaching of human performance is a very complex process.
- There is little connection between the performance review and broader organizational goals.



In general, a performance review is done for the following reasons:

- It is a way to assess how well employees are contributing to the goals of the organization in which they work.
- It provides information about how well an employee is performing that can be used to make decisions about promotion or compensation.
- It gives feedback that will enable employees to continue to improve their performance.

Performance review is traditionally seen as a process of measurement with the main challenge being to find the right ways to measure performance. This view is changing as a result of current research that emphasizes the following:

- Performance review is a process that involves people – it is a highly social activity.
- Not surprisingly, performance review is a task that demands a high level of communication.
- Also importantly, performance review takes place within a context; that is, it must be connected to the organization's goals and the environment in which the organization exists.



Within the setting of an NSO, performance review should contribute to an environment in which

- there are skilled and knowledgeable coaches for all athletes competing in sport.
- there is an environment in which athletes can learn to compete and excel.
- there are effective communication and feedback mechanisms that enable coaches to learn and continue to develop relevant skills in their sport.
- there is a productive and collaborative work environment.

In order to create this environment, performance review of coaches needs to be an integral element of the NSO's human resource management policies and procedures.

## Objectives

As the employer, you want to use a performance review to identify and discuss the abilities and skills of your employee, the coach.

In this setting, a performance review has four objectives:

1. To focus on the coach's performance in their role and identify any issues.
2. To create a plan for the following season that will enable the coach to build on strengths and work on weaknesses.
3. To ensure that athlete or team performances continue to improve.
4. To assess how well the coach is contributing to the goals of the organization.

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## A. Guidelines to the Employer

### a. First Steps: What You Need in Place to Start a Performance Review

In order for a performance review to be productive, you need to have the following in place:

- A **job description** that clearly states the coach's responsibilities. Once this is in place, it needs to be reviewed on a regular basis. It may not be necessary to do so annually; however, if responsibilities change, it should be updated as soon as possible. (See Appendix 2)
- Mutual agreement between employer and coach on the specific **goals and expectations** for the year ahead. This needs to be completed before the start of the season. Expectations can include the level of results or performances of the team and (or) individual athletes, the competencies you expect the coach to demonstrate, and the code of conduct or code of ethics you expect the coach to follow.
- A clear outline of the **process** for performance review that is made known to the coach at the beginning of each year. The coach needs to know *what* the review will consider and *how* and *when* the review will be done.
- A **policy** on how performance review affects compensation and contract renewal.



The performance review, as presented in this handbook, is based on

- **research** about what is currently known about effective performance review.
- **practical experience** working with national coaches and national teams.
- the **framework of competencies** in the high performance context that have been developed for the revised National Coaching Certification Program (NCCP).

The handbook presents a comprehensive approach to performance review that includes a full range of aspects that contribute to performance.

## b. What's Included in a Performance Review

The performance review that is presented in this handbook has five components, explained in the table below.

COMPONENT	FOCUS
1. Goals	Assesses achievements of athletes (team) against Results Goals set at the beginning of the season.  Assesses progress against Process Goals set at the beginning of the season.
2. Competencies	Assesses how well the coach demonstrates the pre-determined competencies for the position.  Uses feedback from others who observe the coach's behaviour.
3. Self-Assessment	Assessment by the coach of their own performance over the season.
4. Factors Affecting Performance of the Coach	Records factors that made achievement of goals more or less challenging.  Acknowledges existing constraints or circumstances that arose during the year.
5. Summary and Recommendations	Provides an overall summary of performance.  Reinforces what the coach is doing well and should continue to do.  Recommends performance improvements and identifies specific changes and how to accomplish them.  Suggests directions for professional development.

## B. Guidelines for Assessing Goals

### a. Before the Season Begins – Setting Goals

Competition results are a visible demonstration of the coach's competencies and have sometimes been the only aspect of a coach's performance that is considered in a performance review. However, results are affected by factors that are often beyond the control of the coach. This handbook introduces two types of goals.

#### **Results Goals**

Identify the ultimate end-of-season performances. This is what we typically associate with performance results. Examples of Results Goals include

- qualifying for world championships.
- increasing the number of international medals won compared to the previous season.
- achieving top-8 world ranking or improved world ranking.
- achieving percentage improvement in times, win-loss records.

#### **Process Goals**

Identify team or individual technical, tactical, or strategic goals that are desirable to accomplish in the season and contribute to the desired Results Goals. Examples of Process Goals include

- creating a productive team environment.
- working through conflict situations effectively.
- implementing individualized training programs for each athlete.

When you conduct the performance review, the assessment of Results Goals should be based on the goals set at the beginning of the season.

Results and Process Goals should also relate to broader organizational goals. Ultimately, the coach's goals for the season should contribute to the achievement of the association's strategic short-term and long-term goals. If the association's goal is to increase the number of athletes qualifying for an upcoming Olympic Games, then Results Goals and Process Goals should relate to this longer-term outcome.

When setting goals, you should also discuss possible circumstances that might prevent the coach from accomplishing the goals. Some may be known at the beginning of the year and these should be noted; for example, athlete injury or retirement, changes in competition schedule, or changes in financial resources. This will help you and the coach understand the assumptions that are being used in setting the goals. You are not doing this so that you rationalize the non-achievement of goals, but rather to recognize that the coach does not control *all* factors that affect performance.

Setting goals is partly an art form – learning how to stay away from the wildly optimistic and resisting the temptation to play it safe. Goals should be realistically ambitious targets.

Finally, goals are written down and copies are retained by the coach and the high performance director or supervisor.

Once goals are set, you must identify the information you will need for the performance review to determine how well Results Goals and Process Goals have been achieved.



Information needed to assess Results Goals should be relatively evident and easily obtained: rankings, finishes, and medals should be published or known within the sport.

Information to assess how well Process Goals are met is less readily available. You will need to prepare in advance so that the feedback you have at the end of the season provides the information you need. You will need input from the athletes, coaching support staff, and others who are directly involved with the coach. Part 2 in Section G can be used as a feedback form by coaching support staff or others. Appendix 1 provides a sample athlete feedback form.

## **b. After the Season Ends – Assessing Results Goals and Process Goals**

The assessment of results addresses whether or not Results Goals were accomplished, the factors that contributed to the achievement or non-achievement of those goals, and the identification of areas for reinforcement or improvement.

When goals are achieved, it is important to understand how the coach contributed to the athletes' or team's success as well as other factors that may have been part of the successful formula. You want to be able to reinforce what the coach is doing well.

When goals are not achieved, the role of the reviewer is to figure out how the coach's performance contributed to that result. Some reasons may be obvious; others will be less so. The reviewer needs to fully explore the reasons behind partial or non-achievement in order to identify possible areas for improvement for the coach. There may be circumstances outside the control of the coach that compromised the possibility of achieving Results Goals. These need to be identified.

Input from others will help the reviewer by providing the perspective of those directly involved with the coach. Feedback will be particularly helpful in assessing how well Process Goals were achieved, particularly goals such as creating a great team environment, working through conflicts effectively, or providing timely information to athletes or the team.

In the sample performance review, a series of questions assist the reviewer to complete a thorough analysis of Results Goals and Process Goals.

## C. Guidelines for Assessing Competencies

### a. Before the Season Begins – Ensure Key Competencies are Confirmed

A competency is a blend of knowledge, skills, experience, and personal qualities that are demonstrated through behaviour and results in the successful performance of a role.

Competencies help to make explicit what we consider to be ‘successful performance’ or performance that contributes to the achievement of stated goals. Competencies help an organization to create a performance management system that develops people who can best achieve an association’s long-term strategies.

This handbook uses the generic competencies identified for the coach in the Competition – High Performance context in the new NCCP as a basis for creating a review of relevant competencies. It is important to collect information from a variety of sources if you want to have useful feedback about the competencies of a coach. This is often referred to as “360 feedback”. Athletes experience the coach’s technical and interpersonal skills on a day-to-day basis in training as well as under the stressful conditions of competition. Assistant coaches (and other support staff) observe and reflect on the coach’s behaviour in similar situations; however, their viewpoint and experiences are different from the athletes. The high performance director (or committee) brings a macro-level and long-term viewpoint that is also useful in assessing the coach’s competencies. Part 2 in Section G and Appendix 1 provide sample feedback forms for use with athletes, assistant coaches, coaching support staff, and others.



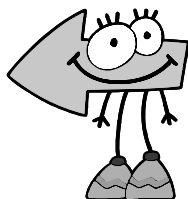
At the beginning of the season, review the feedback forms that you will ask athletes and coaching support staff to complete. The feedback questions should relate to the competencies you think are most important. Then, at the same time as you are setting Results Goals and Process Goals, you should review these questions with the coach. This helps to establish clear expectations beyond Results Goals. If Results Goals and Process Goals state ‘what’ is to be achieved, competencies specify ‘how’ goals are to be achieved.

### b. Planning for the Information You Will Need

You also need a plan for collecting information that identifies

- when you will have others complete the feedback forms.
- what information or education you will provide that enables others to give helpful feedback.
- how you will communicate this role at the beginning of the season.

When you ask others to provide feedback, it is important to emphasize that the objective of the exercise is to provide feedback and comments that will enable the coach to improve his or her behaviour and performance.



**Pay careful attention** to when, where, and how forms are distributed to athletes and coaching support staff and the instructions that are given. You want individuals to reflect on what the coach did well, did not do as well, and to suggest

ways for the coach to be more effective. Research shows that this works best when there is education about the feedback process. Research has also shown that quality of feedback improves over time as those providing feedback become better observers and develop confidence in the process.

Determining when to collect feedback requires careful consideration. There is no one ideal time and, in fact, you will have more useful feedback if you collect this information at different points in the season. For example, athlete feedback could be collected at an early season training camp, mid-way through the competitive season, and just prior to or just after the year's ultimate competition. You want to ensure that particularly good or poor performances do not overly impact the rating of competencies. You are already assessing the coach's role in those particularly good or poor performances when you review Results Goals.

One of the important concerns of athletes and coaching support staff is that you will keep their feedback confidential. They may be concerned that their feedback will come back to haunt them. Maintaining integrity in the feedback process is a fundamental responsibility for the reviewer.

Having the right information and being prepared for the performance review helps you to create an environment that will produce useful dialogue about performance and competency.

## D. Guidelines for Coach Self-Assessment

### a. Before the Season Begins

The function of self-assessment within a performance review is to provide the coach with an opportunity to critically reflect on her or his effectiveness. It has the added benefit of encouraging the coach to think about actions done over the course of the season and to prepare for the review meeting. It also helps to create an interactive environment for the performance review.

Remind the coach at the beginning of the season that this is part of the process.

### b. After the Season Ends

It is important that there is sufficient time for the coach to complete Parts 1 and 2 of the performance review prior to the review meeting. Consider this fact when scheduling the review meeting.

## E. Summary and Recommendations

This section of the performance review is where you identify

- overall themes or trends reflected in the coach's performance in the past season.
- behaviours you want to reinforce – what you want the coach to continue doing.
- areas for improvement – what you want the coach to do differently or stop doing.
- areas for development – how the coach can continue to develop as a professional.

## F. Guidelines for Conducting a Review

### a. Who Should Conduct the Review?

The review should be seen as a process in which the reviewer and the coach both *participate*, rather than one *doing* an assessment of the other. To that end, it is important that the meeting is seen as an opportunity for the ‘supervisor’ and the coach to come together to exchange information on how to work more effectively and create better international performances.

Ideally, one person should conduct the review. This should be the high performance director or the individual who ‘supervises’ the coach. If there is a high performance committee, it is valuable to have the committee members involved in the preparation of the review and agreeing on its content.

Ideally, the reviewer should have been in training and competition settings with the coach over the past season. This will enable the reviewer to be aware of the nuances and difficulties that the coach faced. As well, the reviewer needs solid communication skills. Specifically, the reviewer needs to be able to

- set the tone for the meeting.
- present any criticism of the coach in a constructive manner.
- listen to the coach’s perspective of the situations under discussion.
- guide the process to conclude with a concrete plan of action and specific timelines, if necessary.

Conducting the review one-on-one helps to foster the two-way process that is characteristic of the best performance reviews. With all personnel matters, it is important to be attentive to situations that may compromise confidentiality. For example, if other employed coaches are part of the high performance committee, they should not be involved in the preparation of a performance review of another employee unless they are the supervisor. The composition of the performance meeting should be established at the beginning of the year and should not change at the last minute.

### b. Before the Review

The most important task before a performance review is preparation. If the review is going to happen at the same time as a committee meeting, make sure there is sufficient time scheduled to do a thorough job. You also need to ensure that all of the necessary information is available. There should be two copies of the review available, one for the reviewer and one for the coach.



Before heading into the review, the reviewer should complete all of the sections of the performance review and know what he or she wants to say. Before heading into the review, the coach needs to complete the self-assessment.

The meeting date and place should be confirmed according to what was established before the season started. If this is going to change, it should be re-scheduled at the mutual convenience of those involved.

Pay attention to the setting for the meeting. Look for a space that can create a collegial (for example, round table) environment. Avoid informal settings such as restaurants or rushed time frames such as after another meeting or just before catching a plane. Pay attention to the light and temperature of the space. Attention to the setting should reflect the important nature of the review.

## c. The Review

1. The review should begin with the discussion of Results Goals and Process Goals (Part 1). The discussion should emphasize what was achieved and explore the reasons behind goals that were not achieved. Begin by asking the coach to share her or his assessment. Ensure that the coach discusses what has been done well in the past season (look for specific examples or situations) as well as what needs to improve. Use the coach's assessment to lead into a discussion of the similarities and differences with the reviewer's assessment.
2. The review of the competencies (Part 2) should be done section by section using both the coach's and reviewer's ratings and rationale as the basis for discussion. It is important for the reviewer and the coach to use specific examples, where possible, of what went well in the past season and what may not have gone so well, in order to clarify the rationale of a rating. It is important for the coach to ask questions for clarification as well as add additional information. The reviewer should be open to changing a rating as a result of the coach's input.
3. The discussion of summary and recommendations (Part 3) should be a dialogue between the coach and the reviewer. The goal of the discussion is to create a plan for the new season that incorporates the changes agreed upon by the reviewer and the coach.

### FOR THE REVIEWER

#### ***TIPS FOR COMMUNICATING EFFECTIVELY***

The effectiveness of a performance review is highly dependent upon the communication skills used by those involved. Pay special attention to the following:

- Stay assertive – respect both the coach's needs and interests and those of the association and its athletes.
- Listen to the coach's point of view and explanations. Stay open to being influenced by new information.
- Ask questions if you are feeling defensive OR if you sense the coach is becoming defensive. Check that they are hearing what you are trying to say.
- Remember that dialogue requires that both people talk. Share the airtime – if the coach isn't saying much, ask questions.

### FOR THE COACH

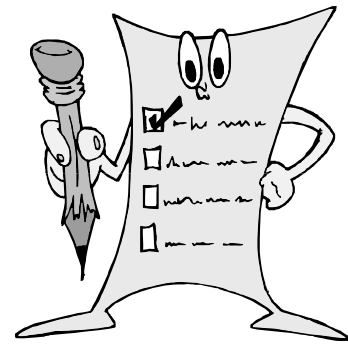
#### ***TIPS FOR COMMUNICATING EFFECTIVELY***

The effectiveness of a performance review is highly dependent upon the communication skills used by those involved. Pay special attention to the following:

- Stay assertive – respect both your needs and interests and those of the association and its athletes.
- Listen to the reviewer's point of view and explanations. Stay open to feedback about your performance.
- Ask questions if you are feeling defensive.
- Check that you understand what the reviewer is saying.

#### d. At the Conclusion of the Review

4. Review the specific strategies for improvement that need to be incorporated into the coach's plan for the next season. These should be recorded in the performance review document. A copy should be given to both the reviewer and the coach. A date should be set for completing next season's plan. The underlying premise is that the reviewer and the coach are working together to plan for a 'successful' new season.
5. At the end of the review meeting, both the reviewer and the coach should sign the form indicating that the review has been conducted.



#### e. Next Steps

6. Once the review is completed, it is important to ensure that there is follow-up. This might involve
  - adjusting the coach's salary according to the association's policy and review recommendations.
  - establishing a budget for recommended professional development.
  - setting up follow-up dates for any specific actions identified in the recommendations.
  - setting the time frame for establishing goals for the new season.

## G. Performance Review Template

The Performance Review Template that follows includes all of the aspects of a performance review that are described in this handbook. There are instructions on how to complete each section.

The template can be adapted or phased in to suit the particular needs of an NSO and its national coaches.

# Annual Performance Review

**Name of Coach:** \_\_\_\_\_

**Time frame considered in this assessment:** \_\_\_\_\_

**Date of assessment meeting:** \_\_\_\_\_

**Persons who participated in meeting:**

\_\_\_\_\_

\_\_\_\_\_

**Persons who contributed to assessment and the nature of their contribution:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Employment History:**

**Date of hire:**

**Date of last review:**

The cover page provides summary information about the performance review that is valuable for personnel history. This can be useful, particularly given changes in personnel involved in performance reviews.

## PART 1: REVIEW OF GOALS

### **INSTRUCTIONS FOR COMPLETING SECTION 1**

#### For the Reviewer

The *first step* in preparing this section is to compare the Results Goals and Process Goals that were set prior to the season with what was actually achieved. Regardless of whether goals were achieved, not achieved, or only partially achieved, it is important to review the end results in light of the factors that contribute to the coach's ability to achieve these goals.

The *second step* is to look at the reasons why a particular goal was/was not achieved. The reviewer/review committee need(s) to identify factors within the coach's control (for example, design of training programs and competition preparation) and those that were not (for example, an athlete's choice to not follow a training program, increased/decreased travel funding, changes in competition schedules, injuries to key athletes, and changes in priorities by the NSO board).

In discussing the degree of success for each goal, the reviewer first discusses the factors within the coach's control. In order to do this, the reviewer should make use of the feedback collected from the athletes, coaching support staff, the reviewer's on-site observations of the coach's performance, and the reviewer's own experience and expertise. This will lead to a clear understanding of the strengths that the coach brings to their performance and clarify areas that need improvement or skills that need to be developed.

It is essential to acknowledge and record factors outside the coach's control. These can be personal, organizational, or external factors that have substantively affected the coach's performance in the past year and compromised their ability to achieve Results Goals and/or Process Goals. The reviewer may not be aware of everything. (Sometimes a coach may not disclose important personal situations that they dealt with throughout the year. A reviewer may not learn about these until the review.)

#### For the Coach:

The coach can prepare for this part of the review in the same manner as the reviewer. However, they will be relying on critical reflection of their experiences throughout the year.

## PART 2: ASSESSMENT OF COMPETENCIES

		Demonstrated Competency	Rating	Supporting examples/explanations
Analysis of performance	1	Skill in analysis of the training and competition preparation required by athletes (the team) to perform internationally	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	<b>INSTRUCTIONS</b> For the Reviewer This section should be completed in advance of the review meeting. The ratings and supporting examples will be based on 1) feedback from athletes. 2) feedback from others (assistant coaches, managers, support personnel). 3) the reviewer's on-site observations of the coach.  <b>HINT:</b> You may want to circle the rating in pencil. This will make it possible to change the rating if the points raised by the coach merit such a change.  <b>For the Coach:</b> Complete this section in advance of the review meeting. Add specific examples from situations throughout the season that support your ratings.
	2	Skill in analysis of the strategies and tactics required by athletes (the team) to perform internationally	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	
	3	Skill in analysis of the psychological preparation required by athletes (the team) to perform internationally	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	
	4	Skill in identifying critical factors that will affect performance in key competitions and an appropriate course of action	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	
	5	Ability to explain the factors that contribute to high performance to athletes and others	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	

	<b>Demonstrated Competency</b>	<b>Rating</b>	<b>Supporting examples/explanations</b>
6	Delivery of training sessions aligned to short- and long-term performance goals and appropriate to the athletes involved	Poor 1 2 3 4 5 6 7 8 9 10	Exceptional 8 9 10
	Organization of training sessions that are time-effective and maximize value of available equipment and facilities	Poor 1 2 3 4 5 6 7 8 9 10	Exceptional 8 9 10
7	Analysis of athletes' or team's performance and determination of necessary changes in training and preparation	Poor 1 2 3 4 5 6 7 8 9 10	Exceptional 8 9 10
	Setting of appropriate level goals for athletes (the team) for the year and long-term	Poor 1 2 3 4 5 6 7 8 9 10	Exceptional 8 9 10
8	Demonstrated ability to set progression of goals to achieve long-range (Olympic) goals	Poor 1 2 3 4 5 6 7 8 9 10	Exceptional 8 9 10
	Ability to have athletes (the team) peak at appropriate times of the season	Poor 1 2 3 4 5 6 7 8 9 10	Exceptional 8 9 10
9			
10			
11			

	<b>Demonstrated Competency</b>	<b>Rating</b>	<b>Supporting examples/explanations</b>
Training Support	12	Effective monitoring of athletes for over-training, injuries, or illness (on own or through use of experts) and appropriate response  Poor 1 2 3 4 5 6 7 8 9 10	Exceptional 8 9 10
	13	Effective feedback to athletes (the team) related to training and performance results	Exceptional 8 9 10
	14	Individualization of training programs for each athlete or team member	Exceptional 8 9 10
	15	Creation of productive working relationship with athletes (the team) both individually and as a group	Exceptional 8 9 10
Competition Support	16	Ensuring that elements surrounding competition (for example, nutrition, transport to and from sites, accommodation, training venues, and so on) support the athletes' (team's) ability to perform well	Exceptional 8 9 10
	17	Ability to analyze athlete's (team's) and competitors' performance and make appropriate adjustments	Exceptional 8 9 10

	<b>Demonstrated Competency</b>	<b>Rating</b>	<b>Supporting examples/explanations</b>
16	Work within assigned budget and effectively manage program resources	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	
17	Manage the logistics of team projects, including travel, team meetings, technical and scratch meetings, and discipline	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	
18	Communicate necessary project information to athletes before and during project	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	
19	Conform to rules and association's code of conduct	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	
20	Apply association's expectations for behaviour of athletes (team) and representation of association	Poor 1 2 3 4 5 6 7 8 9 10 Exceptional	

Program Management

	<b>Demonstrated Competency</b>	<b>Rating</b>	<b>Supporting examples/explanations</b>
Leadership	21	Skill in stepping back from a situation and gathering and analyzing relevant information in order to take appropriate course of action  Poor 1 2 3 4 5 6 7 8 9 10  Exceptional	
	22	Ability to learn from each competition cycle and apply lessons to future planning and decision making  Poor 1 2 3 4 5 6 7 8 9 10  Exceptional	
	23	Act consistently with Coaches of Canada's Coaching Code of Ethics  Poor 1 2 3 4 5 6 7 8 9 10  Exceptional	
	24	Ability to define and communicate a clear vision for athletes (team)  Poor 1 2 3 4 5 6 7 8 9 10  Exceptional	
	25	Instill in athletes (team) belief in their ability to perform at a world level  Poor 1 2 3 4 5 6 7 8 9 10  Exceptional	

This form can also be used to collect feedback from other coaches or support staff. If you do, add a space at the end of the questions under "Other comments you want to add about the coaching situation in the past year."

## PART 3: SUMMARY AND RECOMMENDATIONS

### **INSTRUCTIONS**

#### For the Reviewer

This section is to be used to

- 1) record the summary conclusions of the assessment.
- 2) establish performance expectations for the coming year.
- 3) make recommendations for professional development

If the review is linked to other human resource policies, this section should also include information about the consequences of the review such as awarding performance bonus, renewal of contract, salary adjustments, and so on.

The reviewer and the coach should both sign the form at the end of the review, signifying that the review has been completed.

The performance review should be placed in the coach's confidential personnel file. A copy should be provided to the coach.

It is recommended that the reviewer provide the coach with time to review the document after the meeting. Set a deadline for the coach to submit a signed copy of the review.

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Signature of Assessor/Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

# Appendix 1

## Sample Athlete Feedback Form

Athlete feedback has become a more regular part of the information that is used in a coach's performance review. As outlined earlier in this handbook, there are some important tips for ensuring the maximum value of this feedback.

### Some reminders

- Be clear about your objectives for collecting feedback. Your goal is to enable the coach to improve her or his performance as a national coach. Select only those athletes who train under the direction of the coach.

Feedback improves over time as those providing feedback become better observers and develop confidence in the process.

Education about the process will improve the quality of feedback you receive.

- Plan
  - when you will have athletes complete the feedback forms.
  - what information or education you will provide to the athletes prior to collecting feedback.
  - how you will communicate their role in feedback at the beginning of the season.

Determining when to collect feedback requires careful consideration. There is no one ideal time and, in fact, you will have more useful feedback if you collect the information at different points in the season.

You want to ensure that particularly good or bad performances do not overly impact the rating of competencies. You are already assessing the coach's role in good or poor performances when you review Results Goals.

- Emphasize that you want athletes to reflect on what the coach does well and does not do as well and to suggest ways the coach can be more effective.
- Pay careful attention to when, where, and how forms are distributed to athletes and coaching support staff and the instructions that are given.
- Explain how you plan to maintain the integrity in the feedback process and ensure that feedback remains confidential.
- Remind athletes that one of the main purposes of this assessment is to help the coach improve.

## Athlete Feedback

This feedback form is designed to help you give useful feedback about your coach.

For this feedback to be most helpful, you need to take some time to reflect on your season and how you are working with your coach. Consider

- where was/is your coach most effective in terms of training and competition?
- in what training or competitive situations was/is the coaching not as effective?

Please rate your coach using the following 21 questions. Please give an example or your reasons for the rating you give.

The information you provide will be summarized together with your teammates' ratings. This summary will help the reviewer prepare for the coach's performance review.

### **INSTRUCTIONS FOR REVIEWER**

The questions in the Athlete Feedback do not correspond exactly to the Review of Competencies. The questions for the athletes were written from their perspective. They are related to the competencies, but they present situations as the athlete might experience them.

Athlete Feedback Question	Related to Competency
Questions 1 to 5	Analysis of Performance
Questions 6 to 10	Design of Training
Questions 11 to 13	Support in Training
Questions 14 to 16	Support in Training
Questions 2, 3, 12, 17 and 18	Support in Competition

In preparing for the review, one person should summarize the feedback forms. Average the scores. (It is helpful to identify the range of low and high scores.) Group all the comments related to each question so that common themes become evident.

The person who prepares the performance review will use the athletes' feedback to help rate the coach in the different competencies (Part 2). The summary of feedback may also provide insights about the successful/unsuccessful achievement of Results Goals or Process Goals.

Using the athlete feedback in a summarized fashion protects the anonymity of information. This is important to ensure that athlete feedback is of high quality. If an athlete feels their identity will be obvious, they may feel it is too risky to provide accurate feedback, particularly if it is critical of the coach.

An online survey than can be completed at the athlete's convenience within a specified time frame is a good alternative to paper forms that need to be handed out and collected. Online surveys may improve the athletes' confidence that their responses will be confidential; this method may also allow them additional time to reflect on their answers. However, if you haven't had athletes use online feedback tools before, this is not a good time to start.

## Sample National Team Athlete Feedback Form

	<b>Behaviour</b>	<b>Rating</b>	<b>Comment</b>
1	The coach is able to explain the training and competition demands of excelling at the world level.	Not at all 1 2 3 4 5 6 7 8 9 10 Very well	
2	I am confident in the coach's knowledge about training and competition preparation.	Not at all 1 2 3 4 5 6 7 8 9 10 Very confident	
3	I am confident in the coach's knowledge about strategy and tactics during competition.	Not at all 1 2 3 4 5 6 7 8 9 10 Very confident	
4	I am confident in the coach's knowledge about psychological preparation.	Not at all 1 2 3 4 5 6 7 8 9 10 Very confident	
5	The coach is able to explain the reasons behind training and how it relates to competition and performance goals.	Not at all 1 2 3 4 5 6 7 8 9 10 Very well	
6	The coach creates a safe training environment.	Not at all 1 2 3 4 5 6 7 8 9 10 Very well	
7	The coach makes effective use of practice/training time.	Not at all 1 2 3 4 5 6 7 8 9 10 Very effective	
8	The coach makes good use of available facilities and equipment during practice/training.	Not at all 1 2 3 4 5 6 7 8 9 10 Very effective	

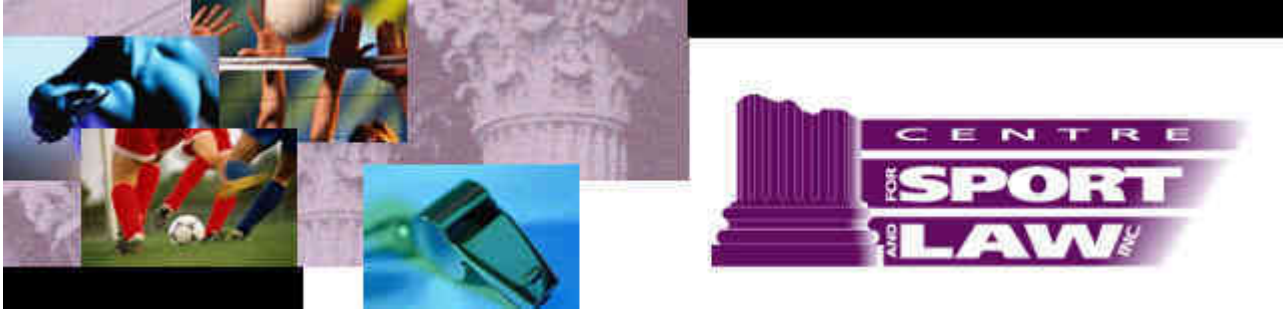
	<b>Behaviour</b>	<b>Rating</b>	<b>Comment</b>
9	There is logical sequence of activities in practice/training.	Not at all 1 2 3 4 5 6 7 8 9 10 Very logical	
10	The coach ensures our team meetings are effective.	Not at all 1 2 3 4 5 6 7 8 9 10 Very effective	
11	The coach works together with me/the team to set goals for the year related to training.	Not at all 1 2 3 4 5 6 7 8 9 10 Very well	
12	The coach works together with me/the team to set goals for the year related to the competition schedule.	Not at all 1 2 3 4 5 6 7 8 9 10 Very well	
13	The coach reviews progress toward goals regularly.	Not at all 1 2 3 4 5 6 7 8 9 10 Very frequently	
14	The coach has an ongoing dialogue with me/the team about progress in training and in competition, delivered in a respectful way.	Not at all 1 2 3 4 5 6 7 8 9 10 Very regularly	
15	The coach provides feedback on an ongoing basis.	Not at all 1 2 3 4 5 6 7 8 9 10 Very frequently	
16	The coach provides feedback on an ongoing basis.	Not helpful 1 2 3 4 5 6 7 8 9 10 Very helpful	

	Behaviour	Rating	Comment
17	The coach makes sure that everything at a competition supports my (the team's) ability to perform well; for example, nutrition needs, accommodation, transport to and from venues, training venues, and so on.	Not at all 1 2 3 4 5 6 7 8 9 10 Very effective	
18	The coach is effective at analyzing my (the team's) performance and my (our) competitors during a competition and helping me (us) make adjustments to perform better.	Not at all 1 2 3 4 5 6 7 8 9 10 Very effective	
19	The coach behaves in an ethical manner; that is, zero tolerance for performance enhancement drugs, sexual harassment, verbal/physical abuse, cheating.	Never 1 2 3 4 5 6 7 8 9 10 Always	
20	The coach helps me believe that I can be a world-class competitor.	Never 1 2 3 4 5 6 7 8 9 10 Always	
21	The coach understands the importance of finding a balance between sport performance and other aspects of my life.	Not at all 1 2 3 4 5 6 7 8 9 10 Very well	

**Other comments about the coaching situation of the past year that you want to add:**

## APPENDIX 2 – Job Descriptions

This article is a reprint of an article written by Hilary Findlay and Rachel Corbett for the Spring 2001 edition of *Coaches Report*.



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### Job Descriptions

A coach is a coach. Right? Wrong. We often think of coaching as a single job. But in fact, there are many different tasks that can go into the job of being a coach. These tasks might include recruiting athletes, liaising with parents, planning training regimes, monitoring fitness levels, designing strength and conditioning programs, supervising training and competition schedules, assisting individual athletes with personal goal-setting, organizing facilities and equipment, developing team selection criteria, selecting teams, and doing all the administrative work that accompanies a competitive schedule. It also means being a bit of an accountant, a travel agent, an insurance broker, a psychologist, a chaperon and a guardian. The job is multi-faceted and the person filling the role of coach is typically multi-talented.

While we might understand all this intuitively, problems arise when these tasks are not clearly described and the authority that accompanies these tasks is not defined. The topic of job descriptions is primarily about human resources and personnel management; it also has a legal dimension because the resulting disputes are often resolved through legal or quasi-legal methods.

Recently we received a call from a coach on the brink of a nasty dispute about the tasks and authority that his coaching job entailed. People within the organization could not (or would not) clarify his authority, and he was becoming increasingly frustrated. We asked if we could have a look at his employment contract, in the hope that it would articulate his responsibilities or at least point us in the direction of a job description. It did neither. The situation that he finds himself in is one of confusion, frustration, and escalating animosity.

There is widespread agreement that a detailed job description is an essential part of the coach's employment contract. But even before a job description is prepared, the sport organization should undertake a job analysis. A *job analysis* involves examining a job position and job-related tasks from the perspective of the needs

and objectives of the organization. Depending on the organization's situation, needs, and resources, the position of "coach" may be broadly or narrowly defined.

In performing the job analysis, the organization should gather information about the responsibilities of the job, the tasks and activities to be performed in fulfilling the responsibilities, the authority tied to the position, and communication and reporting relationships. A coach, or someone familiar with coaching, should be involved in developing this job analysis.

From the job analysis, it is then possible to generate a job description and job specifications. The *job description* sets out the specific duties and responsibilities of the job, working conditions, authority of the coach, and relationship of the coach to others. The *job specifications* identify the skills, talents, education and experience that might be needed, or desired, to execute the job description. Together, these two documents will give the organization a clear view of the kind of person they wish to hire and will give the prospective coach a clear idea of the scope and substance of the job.

The job description needs to be clear and concise and should

- identify the position (title, level, for example)
- summarize the job (major functions/activities)
- define the coach's relationships (reporting to, working with)
- describe the responsibilities and duties of the coach (this expands on the functions and activities and forms the basis for the coach's performance appraisal)
- define authority (types of decisions the coach can make, budgetary limits on decision-making)
- set standards of performance (standards or markers for achievement)
- outline working conditions (travel, hours of work, weekend work, overtime)
- identify job specifications (personal requirements such as abilities, skills, experience, education, level of certification, and other qualifications)

The coach who contacted us feels that he has the authority to select the national team. We reviewed the list of duties set out in his contract and found that he was to be involved in developing selection criteria, but the job description didn't elaborate on how, when, and with whom that would be done. The coach felt that the following phrase authorized him to select the team: "coordinate and administer team appearances, team events and the registration of team members at competitions". We disagreed. In this organization, it is not at all clear how selection decisions are made.

Wouldn't it have been preferable to have a clear and straightforward description of the tasks to be performed by the coach, based on a properly done job analysis? It is well worth the effort to prepare an accurate and clear job description for two reasons: disputes can be avoided and the sport organization can ensure that tasks are being performed by those with the best skills and talents . yet one more step in tipping the scale in the direction of success.

There are other reasons to do a proper job analysis and use it to carefully and accurately set out job responsibilities and duties. A well-done job description will form the basis for performance evaluation, will help to clarify levels of compensation, and will establish levels of seniority. In effect, the job description

defines the employee's value to the organization.

In closing this column, we would like to add that one more task for the multi-tasking coach is to be a good personal business manager. Knowing what the specific coaching job entails, ensuring it is clearly and fully reflected in a well-written job description and incorporating this job description into a coaching contract is a critical part of the repertoire of skills of the professional coach.

