# Practices and Principles for Training Peer Coaches

## A literature study of scientific evidence

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# About this report

Swinburne University of Technology was engaged by the Emergency Services Foundation (ESF) to lead the co-design and evaluation of a **training program for peer coaches** of (prospective and recent) retirees as part of the Well Beyond Program. More specifically, peer coaches to support individuals transitioning into retirement based on age as opposed to injuries, illness, or planned career changes.

During scoping discussions with the Foundation several potential sources of support for retirees were discussed (incl. alumni network, professional coaching etc.), but the core idea was to develop and evaluate a training program in which retired emergency service/management workers would be trained as peer coaches to empower them to coach prospective and recent retirees with a focus on flourishing in retirement. This is a strength-based approach that will leverage the strong social connectedness of people in the sector. Using a 'train the trainer' model of peer coaching, furthermore, promotes sustainability by increasing cost savings as compared to the alternative of agency reliance on paid services such as professional coaches who would have little understanding of the emergency service work environment.

The co-design and evaluation of the peer coaches training are based on Biggs' theory of constructive alignment for teaching and learning, as well asthe guidelines for evidence-based practice formulated by CEBMa (Centre for Evidence-Based Management).

The *Theory of Constructive Alignment* states that the design of a training program should start by clearly identifying learning needs that serve as a basis for the formulation of **learning goals**. Secondly, the **learning design** and the **evaluation** should both be aligned to the learning goals.

The *guidelines for evidence-based practic*e, in turn, stipulates that there are four sources of 'evidence' that should be considered in the design of evidence-based practice:

1. Scientific literature
2. Stakeholders' values and concerns
3. Data
4. Practitioners' professional expertise

The current project consults the **scientific literature,** takes the **stakeholder values and concerns** into account through co-design and participant interviews, collects relevant **data** on learning needs and participant experience, and integrates the **professional expertise of practitioners** through co-design with the instructor of the program.

This document reports on the results of the first phase of this project and focuses on the first source of information stipulated by the guidelines for evidence-based practice; It offers an overview of the insights from the **scientific literature**. As such, it will serve as a basis for the co-design process of the training to develop peer coaches as part of the Well Beyond Program.

# Introduction

The purpose of the current literature study was to identify the scientific insight into the **design and delivery of a peer coaching training program**. This initial desktop literature study was conducted to review existing **research on practices and principles for peer coaching programs** to ensure that the co-design process draws on any available research literature across the globe. This report complements the literature review "Leaving service and retiring well" conducted by Dr Sarah Hewat of the Emergency Services Foundation. Where this study explores peer coaching in relation to retirement needs in general, Dr Hewat's report presents data on mental health and wellbeing challenges and programming solutions for retiring and retired emergency responders in particular.

This report is an important source of information for the content of the coaching sessions that the peer coaches will deliver. It seeks to answer the following questions: :
- What are the characteristics of effective peer coaches?
- Which training principles and characteristics have been shown to be effective?
- What are the learning needs of peer coaches?
- What are coaching techniques for supporting coachee flourishing?
- Which are the boundary conditions that need to be in place for the peer coaching program to be successful and sustainable?

# Study methodology

In building the evidence base for the co-design of the peer coaching training as part of the Well Beyond program, we consulted a range of sources, consisting of published and peer-reviewed academic research (both quantitative and qualitative studies), theoretical and conceptual papers, systematic review studies, books, and book chapters.

Appendix 1 includes the detail of our search strategy, including search terms, databases, and an overview of the search hits. Appendix 2 details the selection process. It outlines the inclusion and exclusion criteria that were adopted and includes a PRISMA flow diagram (Page et al., 2020) illustrating the different steps in the selection process.

# Scope and structure of this report

This review aims to support the co-design process of the peer coaching training. As such, the emphasis lies on peer coaching, with attention to transition coaching but not an exclusive focus on transitions or retirement. This report comprises six sections:

### Section one

Focuses on the concept of flourishing and why it is a valuable perspective to adopt when supporting workers transition into retirement.

### Section two

Elaborates on what peer coaching is and why peer coaching was selected as an approach to support workers transition into retirement.

### Section three

Considers the attributes of effective peer coaches and, as such, offers guidance on who would be an ideal peer coach candidate.

### Section four

Provides insights into how the peer coaching training should be designed. It presents the principles for effectively designing a peer coaching training which will be translated to the specific context of the Beyond Well Program in the co-design workshops.

### Section five

Provides insights into the content of the program. We discuss both the generic coaching skills peer coaches will need as well as skills specifically related to coaching for flourishing in retirement.

### Section six

Discusses the boundary conditions that need to be in place for the peer coaching training to be successful and sustainable.

# 1.  Flourishing in Retirement

The 'flourishing' approach is chosen as a starting point because retirement should be about more than considering financial security, which appears to be the highest priority for most people. Flourishing refers to overall life well-being and takes a positive psychology perspective, rather than the more traditional deficit approach common in similar programs across different occupations (e.g., Cho et al., 2016; Knights et al., 2016). With the proposed training program, the aim is to train the peer coaches to enable them to coach people towards a retirement that is characterised by positive emotions and positive psychological and social functioning. The literature review of dr Hewat showed that Emergency Service workers are often confronted with cumulative trauma across their careers that may require support from trained professionals (i.e. registered psychologist). As such, peer coaches will also be informed about how they can refer their coaches to counselling when needed.

# PERMA model

The PERMA model is a popular scientific theory of well-being developed by professor Seligman and focuses on people thriving and not merely surviving. The PERMA model consists of five building blocks that enable flourishing: **P**ositive emotion, **E**ngagement, **R**elationships, **M**eaning and **A**ccomplishment.

**Positive emotions** refer to feelings of joy, love, gratitude, hope, inspiration, pride, curiosity, amusement, serenity, and awe (Falecki et al., 2018). In this context, it is important to understand that positive emotion does not simply equal "happiness", as this can have a very different meaning for different people (Positive Psychology Center, 2022).

**Engagement** has been defined as an experience in which one is fully immersed in an activity. Psychologist Csikzentmihalyi also referred to this as an experience of "flow" that stems from being involved in an intrinsically motivating activity where (the highest) strength is matched by (the highest) challenge. Flow is often characterised by an absorption of concentration, the disappearance of self-awareness and distorted perception of time in retrospect (e.g. "time flew or stopped").

Humans are social beings, and **Relationships** are fundamental to our well-being. Seligman described relationships as one of the best antidotes to "the downs" of life and the most reliable "up". Connections to others can give life purpose and meaning and also amplify experiences that contribute to well-being, such as meaning, laughter, feeling of belonging, pride, accomplishment, etc.

**Meaning** is derived from belonging to and serving something bigger than yourself. Well-being depends on the feeling that our actions are worthwhile and valuable; we want to feel that our lives and actions matter (Hill, 2020).

**Accomplishment** is defined as the successful application of personal skills and effort towards achieving a desired goal. When we accomplish our goals, we are rewarded with feelings of joy and pride (Positive Psychology Center, 2022).

According to the PERMA model, in order to achieve flourishing, it is important to recognize that the five components work in concert. **As such, it is important to undertake positive actions in each of the five domains**. In what follows, techniques that coaches can utilize to increase each of them are discussed.

To achieve **Positive emotions**, an individual can plan, invest in and participate in positive experiences. It is not the role of the coach to provide these positive experiences, but a coach is well placed to help coachees identify and build positive emotions, even in challenging situations. Given that individuals' emotions and reactions are determined by their interpretation of events, a coach can facilitate the identification of positive experiences through methods that make individuals reflect about what's working well, positive things that happened, and envisioning one's possible self. Moreover, a coach can also challenge existing perceptions of what is not working and identify or develop strategies that are successful through focusing on goal setting, building agency, and generating pathway thinking (Falecki et al., 2018).

**Engagement** or flow can be experienced in a wide variety of activities and can be very personal. As such, a coach can help a coachee recognize which activities bring him/ her in a state of flow. A common technique that is applied is to discover an individual's strengths and values that can then be applied to – for the individual – worthwhile pursuits. There are many different tools on the market that enable individuals to reflect on their strengths, skills, values, drivers, and interests. Regardless of which tools a coach uses, a strength-based approach can help coachees increase engagement via setting and striving towards personally meaningful goals (Falecki et al., 2018, p. 108).

Positive actions in the domain of **relationships** entail developing social and emotional skills to be able to better connect with others. Coaching itself requires a positive connection and depends on an open, honest, and trustworthy relationship (Falecki et al., 2018; Zadvinskis et al., 2011). Good coaches are effective communicators and master active listening, clarifying, empathy, questioning techniques, and rapport-building. As such, these coaches are, in fact, role-modelling the behaviours that should encourage in their coachees. Relationship-building strategies include proactive listening, celebrating others achievements, as well as positively and kindly responding to others.

Achieving **Meaning** is no simple task, and it is common for emergency service retirees to feel a loss of meaning when retiring. Emergency service workers often derive a strong sense of purpose from their work since helping others is a very powerful method for increasing personal meaning (Hill, 2020). As such, an important task for the coach will be to help the coachee identify alternative activities and strategies for achieving meaning. The first step towards this is typically to help coachees reflect and plan for ways to act in accordance with their own values. Similarly to engagement, identification of values and goal setting are central here (Falecki et al., 2018).

**Accomplishment** is closely tied to feelings of mastery and competence and may require perseverance. A coach can help a coachee set and strive for meaningful and realistic goals, help manage setbacks, and encourage a growth mindset. A common coaching model that supports the model toward accomplishment is the GROW model (Hagen et al., 2018) (see Figure 1):
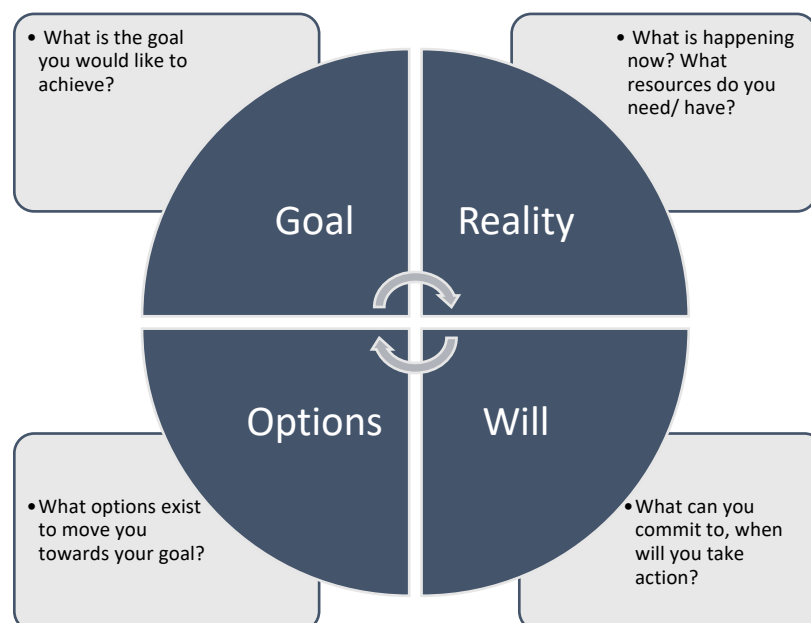
Figure 1: GROW coaching model

# Coaching needs before and after the transition to retirement

The study of Dodwell (2020) focused on coaching needs before and after the transition to retirement. Her general conclusion is that these needs differ before and after this transition. Table 1 (based on insights from (Cho et al., 2016; Dodwell, 2020; Knights et al., 2019; Stara et al., 2020) gives an overview of the needs before and after retirement, with practical issues taking priority before retirement. Interestingly in hindsight, most participants recommended more holistic planning, with occupation planning being given more priority and more time to consider options or skill development.

Table 1. Retirement needs

| Before retirement | After retirement |
|---|---|
| • Practical issues<br>• Financial planning<br>• How to retire (e.g. tapered exits) | • Occupational planning - How to occupy time post-retirement<br>• Understanding which activities would deliver fulfillment<br>• Dealing with identity loss<br>• Ageing - fighting with stereotypes |

This section provided an overview of the concept of flourishing, including the PERMA and GROW models, and how this relates to a positive transition to retirement. The following sections will introduce the review of peer coaching and peer coaches.

# 2. Peer Coaching: What and why?

The aim of this section is to give a general understanding of what peer coaching is and present the benefits that have been attributed to peer coaching.

# What is peer coaching?

While coaching, mentoring, and sponsorship are often used interchangeably in the literature, considerable efforts have been made to define and distinguish the unique characteristics of each. The purpose of this section is not to go into conceptual discussions on the differences and nuances of the many existing definitions but rather to stipulate what peer coaching means in the context of this project. Coaching refers to a **long-term, regularly scheduled interaction** between a coach and coachee; as such, it is dyadic in nature (Blackman et al., 2016; Hagen et al., 2017; Zadvinskis et al., 2011). It is **aimed towards growth** and does not start from the premise that something is broken or needs to be fixed (Brown & Rusnak, 2010). A coach and coachee **work together to understand the coachee developmental goal or task**, challenge current constraints and explore new possibilities in order to attain goals and i**mprove the quality of life** and/or work (Blackman et al., 2016; Brown & Rusnak, 2010; Zadvinskis et al., 2011).

As the terminology implies, within peer coaching, the **role of the coach is taken on by a peer**. The formal definition of a peer is "*one that is of equal standing with another, an equal in terms of standing, abilities, background, etc.".* Within this project, a peer is a person who has had the same career experience in emergency service / management as the coachee, who has **lived through a similar experience the coachee faces** at the time of engaging in the coaching. Mutuality or reciprocity must exist within a peer coaching relationship as it is based on a mutually beneficial partnership (Hagen et al., 2017).

# Why peer coaching?

Johnson et al. (2021) stated that while a broad range of providers can be trained as coaches, peer services have demonstrated a positive impact, particularly for individuals with well-being concerns. The benefits that are attributed to peer coaching are partly inherent to coaching itself and partly specific to the fact that the coaching is performed by peers. We will first discuss the benefits of coaching and then highlight the elements that are specifically tied to peer coaching.

## *Benefits of coaching*

Prior research has shown that coaching is an **effective** way of supporting individual growth and development, especially in comparison with traditional training programs. For the coachee, the benefits that have been shown include improving *self-awareness* and *assertiveness* (Gatling et al., 2013), *psychological and social competencies* (Wales, 2003), *adapting to change* more effectively, *developing relationships* (Wales, 2003) and *changing behaviours* (Wasylyshyn, 2003).

In contrast with counselling, for example, coaching does not take a deficit approach; it is not meant to work through traumas or help a coachee recover from setbacks. Coaching is **oriented towards growth** and aims to achieve **results**. Setting authentic and realistic goals is central to coaching.

*Benefits of **PEER** coaching*

On top of the more general benefits associated with coaching discussed above, peer coaching also entails additional specific benefits. Several studies propose that peer coaching is more **cost-efficient** (Cruz et al., 2021; Pearce et al., 2012; Yu et al., 2019) and more **scalable** (Aschbrenner et al., 2016; Eaton Hoagwood et al., 2018) since the investment in professional trainers can be reduced significantly. Training peer coaches enables organizations and communities to build knowledge and capacity at the local level. This has two significant benefits. First, this creates the potential to reach underserved groups and areas (Fitzgerald et al., 2009; Weaver et al., 2021; Yu et al., 2019), which is especially important where support services might not be readily or sufficiently available in rural or remote areas. Secondly, peer coaches have ties to their local community (Tobias et al., 2012; Yu et al., 2019) and can play a crucial role in translating insights and knowledge into community appropriate and efficient approaches and actions. The combination of these elements (cost-efficient, scalable, ties to the local community) – together with sufficient number of (active) peer coaches – results in a (more) sustainable model than coaching offered by a group of professional coaches (Tobias et al., 2012; Yu et al., 2009).

# 3. Who? Attributes of Effective Peer Coaches

This section focuses on the attributes of effective peer coaches and, as such, offers guidance on who would be an ideal candidate for the peer coaching training. While there is little empirical research demonstrating the extent of the impact of these attributes on the process and outcomes of peer coaching, several studies do offer valuable insights and guidance for recruitment and selection within a peer coaching training program. In this section, we focus on the individual differences that exist and not the competencies that can be learned through a peer training program, as these will be addressed in section five.

First of all, the study of Tschannen-Moran and Carter (2016) showed that individuals who participated **voluntarily** in a peer coaching program reported higher learning gains. At the same time, the study of Weaver et al. (2021) showed the benefits of a mandated train-the-trainer program. However, like in any training program, **motivation** is a crucial factor for learning as well as actually utilizing the competencies that were acquired during training (Kozlowski et al., 2001; Lefkowich et al., 2018; Tschannen-Moran & Carter, 2016). In addition, the study of Lloyd et al. (2009) discussed the importance of a basic level of **confidence** to act as a peer coach. However, it needs to be noted that confidence can and should be further developed through peer coaching training (Fitzgerald et al., 2009).

In line with the definition of peer coaching, studies have highlighted how important it is that peer coaches have had **relevant experience** (Blackman et al., 2016) in order to establish credibility and facilitate exchange of perspectives on the lived experience each has. Moreover, in order for peer coaches to become important actors in the community, it is important that they have, in fact, **ties to the community** (Lloyd et al., 2009; Yu et al., 2009). In this case the primary community would be the emergency service / management sector, in addition to their local communities.

Finally, several characteristics that facilitate establishing trust, which is pivotal within a peer coaching relationship, were identified. Effective coaches typically have integrity (Blackman et al., 2016), maintain confidentiality (Blackman et al., 2016; Robbins, 1991), calm personalities (Blackman et al., 2016; Tschannen-Moran & Carter, 2016), are non-judgemental (Blackman et al., 2016; Tschannen-Moran & Carter, 2016; Tobias et al., 2012) and are generally considered trustworthy (Blackman et al., 2016; Tschannen-Moran & Carter, 2016).

Figure 2 gives an overview of the individual attributes of effective peer coaches that were identified in this literature study which are not competencies that can be addressed through training.
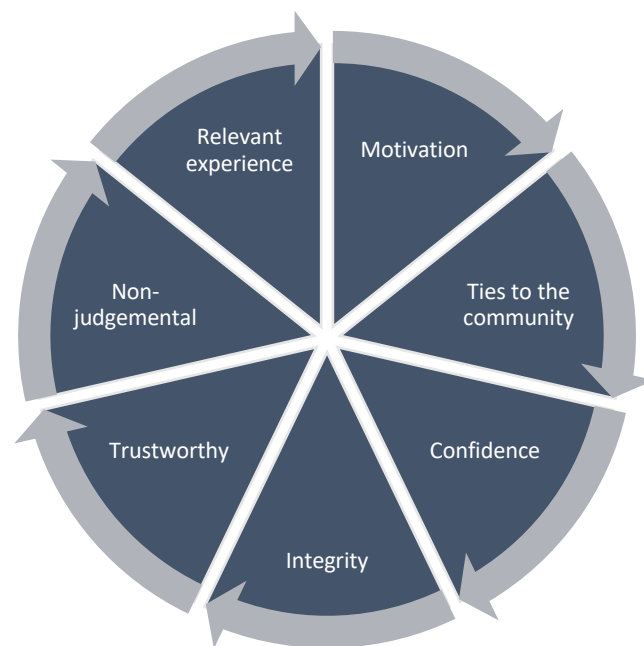


Figure 2. Individual attributes effective peer coaches (excl. competencies)

From the summary of peer coaching and peer coaches presented above, we now move to the review of effective program design.

# 4. How? Principles for Effective Program Design

## Theory of Constructive Alignment

The *Theory of Constructive Alignment* is a holistic educational theory that outlines the basic logic that should be followed when designing a training program. In sum, it states that the design of a training program should start by clearly identifying learning needs that will serve as a basis for the formulation of **learning goals**. Secondly, the **learning design** and the **evaluation** should both be aligned to the learning goals (Biggs, 1996). With respect to (peer) coaching, the research of Kozlowski et al. (2001) has demonstrated that formulating and communicating **mastery goals** leads to higher learning gains (Jordan et al., 2017). The recommendation is to advise participants that their purpose is to learn, understand and master the competencies that are central to the program, and to emphasize that errors are learning opportunities and not moments of failure. It is also important to present the learning goals at the start of the course and to include them in the learning materials so that they can guide trainees in their learning (Jordan et al., 2017; Kozlowski et al., 2001). Figure 3 gives a graphical overview of the theory of constructive alignment (Biggs, 1996).



Figure 3. Constructive alignment (Biggs, 1996).

# Effective training activities

In general, research has shown that peer coaching programs that embed **experiential** (Aschbrenner et al., 2017; Bell et al., 2017; Lefkowich et al., 2018; Pearce et al., 2012) and **interactive learning** (Fitzgerald et al., 2009; Jordan et al., 2017; Lefkowich et al., 2018; Pearce et al., 2012; Yu et al., 2009) **activities** are more effective in supporting peer coaches to realize the learning goals and deliver the above-mentioned benefits of peer coaching. **Experiential learning** activities facilitate the internalization of practices (Laske, 2006; Lefkowich et al., 2018) in a way that it becomes the second nature of a peer coach to act in a coaching manner. For example, some peer coaches started using their active listening skills not only in their coaching sessions with peers but also in their daily lives. Based on their systematic review, Pearce et al. (2012) state that **multifaceted interactive training** is most effective and can be realized in different ways.

Concrete training activities that should be combined are:
- Creating opportunities for authentic **practice** (Eaton Hoagwood et al., 2018; Hagen et al., 2017; Pearce et al., 2012; Robbins, 1991; Tobias et al., 2012; Yu et al., 2009; Zadvinskis et al., 2011).
- Receiving and providing **feedback**. Trainees do not only learn from feedback that is provided by the expert coach but also benefit from receiving feedback from peers and giving feedback to their peers (Pearce et al., 2012; Robbins, 1991; Tobias et al., 2012; Yu et al., 2009; Zadvinskis et al., 2011).
- Stimulating and creating opportunities for **reflection** (Bell et al., 2017; Dupont & Reis, 1990; Jordan et al., 2017; Lefkowich et al., 2018).
- Enabling moments for **observation** through role modelling and demonstrations (Jordan et al., 2017; Pearce et al., 2012; Robbins, 1991).

Figure 4 summarizes the concrete training activities that have been found to be effective in peer coaching training programs.
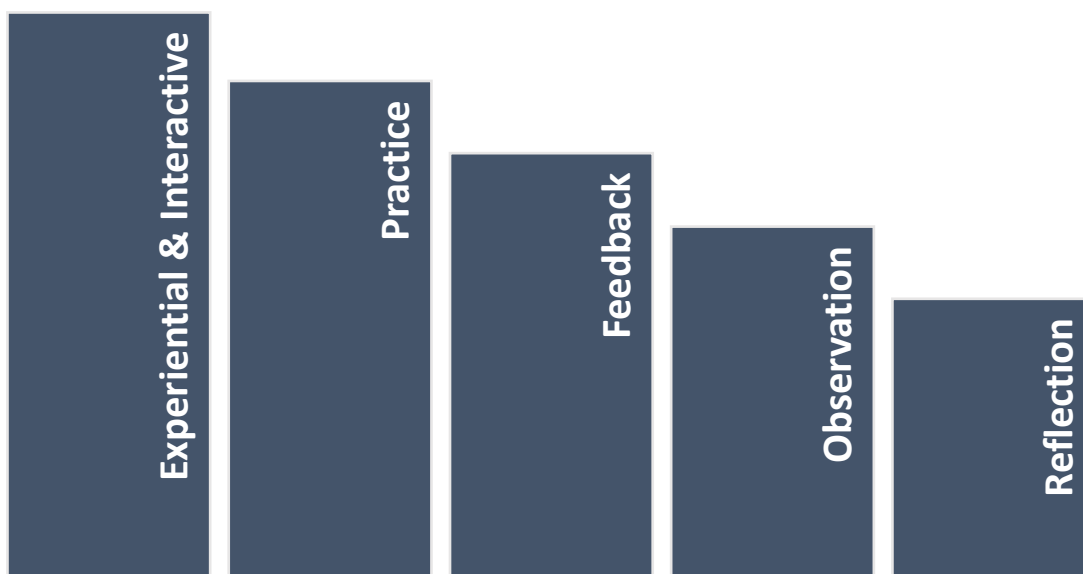


Figure 4. Effective training activities

# Overall program design

While brief and isolated training sessions have some value in training simple (technical) skills, they are inadequate for training peer coaches. Very much in line with the research on learning and development in general (Bell et al., 2017), research on peer coaching training has shown that **spaced learning,** that is, training that consists of **shorter repeated training sessions**, is more efficient than a long one block training (Grant, 2007; Tschannen-Moran & Carter, 2016). This spaced learning approach gives the participants the opportunity to reflect on what they have learned and come back to the instructor with questions, provides time for the participant to start using specific skills in between training sessions, and avoids fatigue during long training sessions.

The **availability of learning materials** during the training **and resources** for conducting peer coaching sessions afterwards were also highly valued by participants and contributed to the effectiveness of the training, as well as the practical application of training.

A mixture of training activities is advised. A peer coach needs to acquire a variety of skills (see section 5), and in line with the theory of constructive alignment, it makes sense that a **variety of activities** are provided to achieve this. Another imperative for success has been shown to be the creation of opportunities for bonding and "buddying up" of peer coaches (Lefkowich et al., 2018; Lloyd et al., 2009; Robbins, 1991; Santos et al., 2021). Several studies have shown that it is important to invest in community building within as well as beyond the peer coaching training program as this will facilitate trust, learning and sustainability of the benefits of implementing peer coaching (Lefkowich et al., 2018; Lloyd et al., 2009; Robbins, 1991; Santos et al., 2021).

# Practical considerations

Above, principles and practices that have been identified in the scientific literature as being effective for designing and delivering peer coaching training programs were discussed. These principles will be the starting point of the co-design process that will lead to the development of a peer coaching training program specifically for emergency service / management workers that will be a key element of the ESFs Well Beyond Program. A theoretically ideal coaching programming would implement all these principles in an elaborate training program; however, in practice, this might not be feasible or desirable. As such the translation of these principles into a program that can be implemented in a sustainable way is most important, and will take into account the **delivery mode** (e.g. face-to-face or online, synchronous or asynchronous, use of technology, etc.) as well as the **time investment**. In terms of the delivery mode, research shows that a golden bullet does not exist, and **certain technologies are not superior to others**. It is, however, important to always put learning above merely delivering a program, and as a general rule, a **spaced, interactive, and multifaceted program** tends to be most effective and efficient.

The study of Lai et al. (2017) provided a set of guiding questions for the co-design process:
- What outcomes/impacts would demonstrate that we have met our goals?

- What kinds of behaviours do the participants need to change in order to achieve the targeted outcomes?
- What knowledge or skills do the participants need to acquire before changing their behaviour?
- What types and number of participants do we need to recruit?
- What has to be in place for the recruitment of participants?
-  What resources are required for implementing recruitment and the behaviour change program the trainees were to design?

We now move from the design of program delivery to the content of the training.

# 5. What? Content of the Peer Coaches Training

This section focuses on what the learning needs are of peer coaches and, as such, what the content of the program could be. We discuss both the generic coaching skills peer coaches will need as well as skills/techniques/models specifically related to coaching for flourishing in retirement.

## Coaching skills

Generic coaching skills are important for all types of coaches, not only peer coaches and typically entail a set of communication skills, goal-focused coaching skills, and competencies related to emotional intelligence. The study of Grant (2007) has shown that both goal-focused coaching skills and emotional intelligence can be enhanced through training, with the first requiring substantially less time than the second. Short intensive programmes may improve participants goal-focused coaching skills, but longer-term and repeated intervention (e.g. spaced sessions combined with feedback) are required to improve emotional learning. The following skills can be addressed in the peer coach training (e.g. Blackman et al., 2016; Cho et al., 2016; Grant, 2007):

### Communication skills
- Active listening
- Question techniques
- Reflection skills
- Clarifying / paraphrasing
- Rapport building strategies

### Goal-focused coaching skills
Ability to:
- deliver tangible outcomes during coaching sessions
- develop a strong working alliance with the coachee

- emphasize constructing solutions not merely analyzing problems
- efficiently set goals
- manage the coaching process over time and hold the coachee accountable for completing any agreed actions.

## Emotional Intelligence

- Self-awareness: the ability to accurately perceive one's own strengths, interests and emotions
- Empathy: The ability to accurately perceive emotions in others
- Understanding how different emotions arise and change over time

## (Self-)regulation

The ability to use the knowledge gained from the first three skill areas to manage emotions and translate them into constructive action.

# Coaching for flourishing in retirement

**PERMA-based coaching** (Falecki et al., 2018; Green & Palmer, 2018) is focused on creating awareness of positive emotions and where they stem from, encouraging the identification and use of strengths, supporting the creation and maintenance of positive relationships, establishing connection or reconnection to meaning and purpose, and celebrating achievements. Self-assessment tools such as the PERMAH profiler (Butler & Kern, 2015) can help coaches and coachees assess the current levels of flourishing across domains to determine a baseline for discussion of well-being goals and subsequent coaching activities. The questionnaire at www.authentichappiness.org is free after registering and it provides a score and report. It is important to keep in mind that the different domains are interrelated and not be tempted to oversimplify the model and address the domains separately. This would be addressed in peer coaching program.

PERMA is a potentially powerful approach to increase well-being in times of career transitions. It can support the coachee through a career transition in the following ways:

- **Positive Emotion:** Manage positive and negative emotions associated with a career transition. Reflection on achievements, plan & participate in healthy positive experiences.
- **Engagement**: Identifying strengths & applying them in worthwhile pursuits.
- **Relationships**: Reflect, track, and invest in positive interactions.
- **Meaning**: Exploring future ideal situations and values.
- **Accomplishment**: Setting and striving for self-concordant goals and helping set SMART goals (see Figure 5).
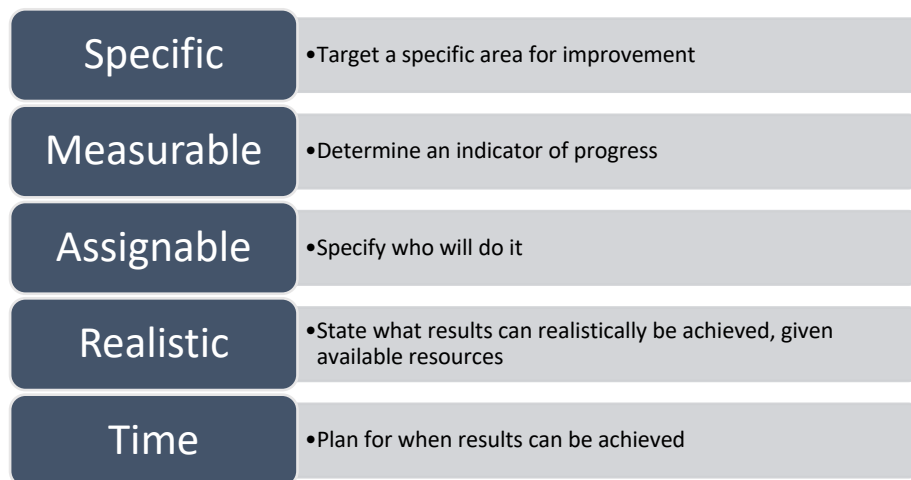
| Specific | •Target a specific area for improvement |
| Measurable | •Determine an indicator of progress |
| Assignable | •Specify who will do it |
| Realistic | •State what results can realistically be achieved, given available resources |
| Time | •Plan for when results can be achieved |

Figure 5. SMART goals

Another useful model for transition coaching (O'Riordan et al., 2017) is the INSIGHT model from Panchal et al. (2020). This **INSIGHT model** includes the following steps and potential actions that coachees can take with the support of their coach:

1. **Increasing self-knowledge**
   a. Consider your strengths and leverage them
   b. Work with your personality
2. **Normalizing transitions**
   a. Keep transition truths in mind:
      - Transitions take time
      - Transitions involve emotions
      - Transitions affect everyone
3. **Supporting positive coping**
   a. Focus on the basics (I.e. sleep, diet, relaxation, and exercise)
   b. Engage support and connect
   c. Take control
   d. Set boundaries[1]
   e. Help others
   f. Gratitude – appreciate what you have, look for the good in everyday
4. **Integrating past, present, and future**
   a. Past: What skills, ideas and perspectives from your past can be applied in the current situation?
   b. Future: How might this situation connect with your future? Imagine yourself at a point in the future – how would you like to look back on this time?

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[1] The need to maintain boundaries and have the skills to maintain has been shown to be specifically challenging for peer coaches (especially in more critical situations where - in the context of the ESF project - referral might be needed) (Guenzel & Dai, 2021)

5. **Giving time and space**
   a. Some will have more time than before, others less, but everyone will benefit from reflection time and space to process their experiences during this challenging period.
6. **Highlighting broader context**
   a. Helpful perspectives: be aware of the broader context.
   b. Check influences: Be mindful of the influences of others (family, friends, etc.), make a decision that makes sense for you.
7. **Tailoring action**
   a. Set goals: Short-term goals can be constructive.
   b. Recognize achievements, however small. Writing these down regularly can help to consolidate them in your mind.

The principles of both the PERMA and INSIGHT models of coaching will be drawn on in the co-design of the Well Beyond peer coaching program and be used as the formative framework by the peer coach trainer in the delivery of the program to prospective peer coaches.

# 6. Boundary Conditions for the Sustainability of Peer Coaching

Even if the peer coaching training is organized perfectly, there are still boundary conditions that need to be in place for peer coaches to commence and continue to act as peer coaches beyond the initial training. While not all approaches are feasible in every context, and what might work in one context does not necessarily yield the same results elsewhere, there are a couple of conditions that can be created to provide continued support to peer coaches beyond their initial training (e.g. Wheaton et al., 2008; Pearce et al., 2012). Figure 6 gives an overview of different mechanisms that were implemented within but also beyond the initial training program that were deeply appreciated by peer coaches and helped peer coaches to be successful in their role.
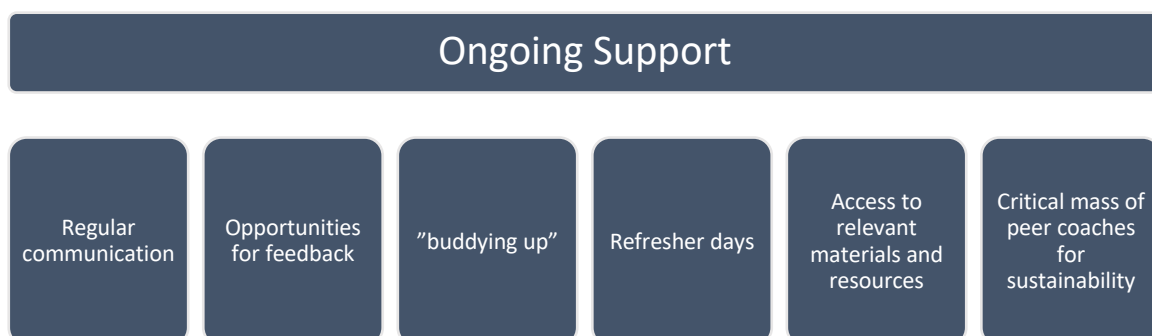


Figure 6. Mechanisms for ongoing support

# Conclusion

This literature study complements the previous Emergency Services Foundation studies undertaken to inform the development of the ESFs Well Beyond: Transition to Retirement program. This literature study specifically aimed at identifying evidence-based principles and practices for the design of a peer coaching training program. This training program will be the first important step in setting up a network of peer coaches that will support emergency service / management workers to transition to a retirement characterised by flourishing. Starting from a thorough systematic search of several scientific databases, 39 manuscripts (e.g. peer-reviewed articles, books chapters, and books) were selected and analysed. Based on this information, we defined peer-coaching, explained the PERMA model from Seligman that underpins flourishing and identified important elements for the selection of peer coaches, the design of the program, content of the program as well as which ongoing support for peer coaches would benefit the sustainability of the program. The main insights from this literature study have been summarized in an infographic (see Appendix 3 and separate document).

# Next steps

This literature study of scientific evidence is the first step in developing an evidence-based peer coaching program for the Emergency Services Foundation that aims to support peer coaches who will support emergency service / management workers' transition into a flourishing retirement. The information from this literature study, together with the literature review by Dr Sarah Hewat and qualitative study undertaken by Right Management which both provide insights into the transition experiences of retirees from the Emergency Services sector, will provide the basis of a co-design workshop. This co-design workshop will involve prospective peer coaches, the training facilitator, other key stakeholders and the researchers from Swinburne University of Technology. The aim of this workshop is to design a program that incorporates and translates the principles and practices that were identified in the studies into a format that is appropriate for and sustainable within the context of the Victorian emergency service / management sector. Subsequently, the training program will be piloted with a small group of around 10 prospective peer coaches and applied to a pilot group of people in transition to retirement. Evaluation will be undertaken with the purpose to further optimise the program and demonstrate its outcomes. Based on the findings of this literature study, we foresee that considerable time will need to be invested in creating supporting resources for peer coaches as well as establishing a network/community of and for peer coaches.

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# Appendix 1: Literature Search Strategy

This appendix provides an overview of the search terms, databases and number of search hits.

## *List of search terms*

The goal of the literature review was to identify best practice coaching approaches and principles for training peer coaches. As such, a variety of search terms/synonyms were used, focusing on peer coaches and the training thereof. The following search terms were used:

- "Peer coaches"
- "Training" + "Peer coaches"
- "Train the coach"
- "Coach the coach"
- "Training of coaches"
- "Training coach"
- "Coach training"
- "Train the trainer"
- "Training of trainers"

## *Consulted databases & Disciplines*

A variety of databases were searched to ensure that all relevant literature could be retrieved. On the one hand, discipline-specific databases – selected based on the expertise of the researchers – were consulted to retrieve specialized studies (e.g. ERIC, Econlit, & APA). On the other hand, multidisciplinary databases were consulted to ensure broad coverage of the topic across a broad range of disciplines. More specifically, the following databases were searched:

| Databases | Included disciplines |
|---|---|
| Education Resources Information Center (ERIC) | Education, Educational psychology, Training & Development, etc. |
| Econlit (by American Economic Association) | Economics and Business. |
| American Psychology Association (APA): PsycNet/ PsycArticles | Psychology (Applied, Clinical, Organisational, Educational, etc.), Behavioural Sciences & Nursing. |
| Academic Search Premier | Multidisciplinary database (including but not exclusively open access journals). |
| Web of Science (WoS) – Social Science Citation Index (SSCI) | Social Sciences including 50 different social science disciplines. |

## *Overview of search hits*

| | Eric | Econlit | APA (PsycNet, PsycArticles) | Academic search premier | WoS - SSCI* | *Subtotal* |
|---|---|---|---|---|---|---|
| "Train the trainer" | 209 | 3 | 326 | 607 | 897 | *2042* |
| "coach training" | 28 | 4 | 157 | 116 | 169 | *474* |
| "training coach" | 2 | 20 | 14 | 27 | 14 | *77* |
| "training of trainers" | 309 | 9 | 68 | 289 | 6 | *681* |
| "coach the coach" | 11 | 0 | 8 | 102 | 8 | *129* |
| Training + "peer coaches" | 16 | 0 | 21 | 20 | 38 | *95* |
| "train the coach" | 19 | 3 | 1 | 12 | 2 | *37* |
| "training of coaches" | 23 | 0 | 18 | 89 | 30 | *160* |
| "peer coaches" | 51 | 0 | 53 | 61 | 97 | *262* |
| *Subtotal* | *668* | *39* | *666* | *1323* | *1261* | *3957* |

*Topic only

**Note:** A separate search was conducted for coaching for flourishing, positive psychology coaching and coaching for retirement.

# Appendix 2: Literature Selection Process

## *General Inclusion/exclusion Criteria*

- English
- Peer-reviewed
- Not teacher training or teacher professional development (education) unless specific focus on peer coaching
- Not education context
- Focus on training design & activity (not outcomes of peer coaches)
- General participants (no disability or giftedness)
- Research – not merely description or report of activities, manuals or curriculum packages

## *ESF sub-selection*

Focused on achieving coverage of studies that have one or more of the following characteristics.

- Program implemented in Australia
- Peer coaching focusing on mental health
- Professional groups from the emergency services sector or related (e.g. social work)
- Focus on interpersonal & metacognitive skills (not technical skills)
- Focus on developmental coaching, transition coaching (incl. coaching for retirement).

*PRISMA flow diagram illustrating the different stages of the selection process*

## Identification of studies via databases and registers

**Identification**

Records identified from:
 Databases (*n* = 3957)

*Search commenced on September 30th, 2021, finalized on October 7th, 2021.*

→ Records removed *before screening*:
 Duplicate records removed using EndNote (*n* = 887)

**Screening**

Records screened - Tittle
(*n* = 3070)

→ Records excluded:
 - Not English or manual removal duplicate (*n* = 354)
 - Obvious mismatch with RQ (*n* = 2180)

Records screened – Abstract
(*n* = 536)

→ Records excluded
 - Based on inclusions criteria (*n* = 306)
 - No abstract available (*n* = 89)

Records screened for ESF - Abstract
(*n* = 144)

→ Records excluded based on ESF specific criteria including lack of full text

(*n* = 100)

Records screened for ESF – Full text
(*n* = 44)

→ Records excluded based on ESF specific criteria

(*n* = 7)

**Included**

Studies retained & analyzed
(*n* = 28)

→ Separate search on positive psychology coaching and developmental coaching

(*n* = 11)

Studies included in review (*n* = 39)

Adapted from Page MJ, McKenzie JE, Bossuyt PM, Boutron I, Hoffmann TC, Mulrow CD, et al. The PRISMA 2020 statement: an updated guideline for reporting systematic reviews. BMJ 2021;372:n71. doi: 10.1136/bmj.n71

# Appendix 3: Infographic



## Practices and Principles for Training Peer Coaches

A LITERATURE STUDY OF SCIENTIFIC EVIDENCE

### PEER COACHING

Peer coaching is a confidential process in which a coach and coachee of equal status regularly interact across a longer period of time with the purpose to achieve growth and greater quality of life. The coach is a peer who has lived through a similar experience the coachee faces.

*For*

### FLOURISHING

Flourishing refers to overall life well-being and takes a positive psychology perspective, rather than the more traditional deficit approach. The aim is to train the peer coaches to enable them to coach people towards a retirement that is characterized by positive emotions and positive psychological and social functioning.
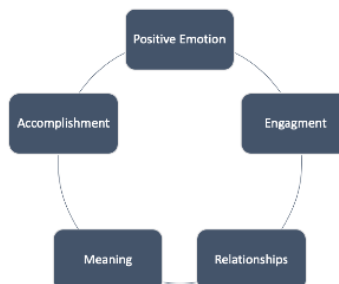
### WHO?
**Characteristics of Effective Peer Coaches**

- Motivation
- Ties to the community
- Confidence
- Integrity
- Trustworthy
- Non-judgemental
- Relevant experience

### HOW?
**Principles for Effective Program Design**
- Spaced
- Multifaceted
- Variety of learning activities

**Effective Learning Activities**

- Experiential & Interactive
- Practice
- Feedback
- Observation
- Reflection

### WHAT?
**Coaching Skills and PERMA-based Coaching**

- Communication skills
- Emotional Intelligence
- Goal-focused coaching skills

- Positive Emotion
- Engagment
- Relationships
- Meaning
- Accomplishment

### ONGOING SUPPORT
**Ensuring Sustainability**

- Regular communication
- Opportunities for feedback
- "buddying up"
- Refresher days
- Access to relevant materials and resources
- Critical mass of peer coaches for sustainability

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